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*Atypical Careers and Innovative  
Services in Library and  
Information Science*

WALTER C. ALLEN  
and  
LAWRENCE W.S. AULD  
*Issue Editors*

# Library Trends

Winter 1984

# Library Trends

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# Library Trends

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# *Atypical Careers and Innovative Services in Library and Information Science*

WALTER C. ALLEN  
and  
LAWRENCE W.S. AULD  
*Issue Editors*

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## Introduction

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LAWRENCE W.S. AULD  
WALTER C. ALLEN

WHAT WAS ANNOUNCED as the twenty-eighth Annual Allerton Institute was to have taken place on 31 October-3 November 1982. The topic was "Information Practice—Atypical Careers and Innovative Services in Library and Information Science." In spite of a surge of expressions of interest, actual registrations were too few to warrant bringing the speakers together, and the institute was cancelled. This issue of *Library Trends* includes nine of the twelve papers originally announced for the institute; another paper which would have fit nicely into the program; and a brief bibliographic essay. Two of the papers were published elsewhere and are reprinted here in order that the full topic of the institute can be properly represented.

Toni Carbo Bearman's paper deals with the same concepts that would have gone into her keynote talk. F.W. Lancaster, the first to prepare a paper for the institute, asked for and received permission for his paper to be published in the *Wilson Library Bulletin*. Although *Library Trends* does not usually reprint materials which have been previously published, an exception was made in this issue, because omission of the two papers would have left significant gaps in the institute's structure.

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Most librarians, having been true to their namesakes, have worked in libraries, and information scientists have generally maintained similar institutional ties. However, a small but growing number of library and information scientists work outside institutional constraints, and their numbers are expected to grow substantially in the next two decades. Whether working alone or in small groups, these information practitioners provide an added dimension to the realm of direct information services to clients. Also, there are opportunities for libraries to employ these information practitioners to meet specific needs which are not adequately met within traditional service structures.

The purpose of the twenty-eighth Allerton Institute was to have been an examination of a cross-section of atypical employment opportunities for librarians and information scientists. Some of the implications for individual and group practitioners, their clients, librarians considering making the break, administrators considering new techniques, and the programs of education in library and information science necessary to support them were to have been considered.

A generic term for librarians, information scientists, and members of other closely allied groups might be *Information Consultant*, and the work of an Information Consultant is *Information Practice*. The parallel with medical and legal practice becomes much clearer when the range of professional activity is seen to include Information Consultants who are both institution-based and institution-independent. Thus, although the institute topic is specific to only one aspect of professional activity, it is clearly part of the mainstream.

That the topic of "atypical careers" is of general interest is borne out by the prominence of the author of the paper entitled "The Changing Role of the Information Professional," written originally for the 1982 Annual Conference of the Special Libraries Association. Toni Carbo Bearman, Executive Director of the National Commission on Libraries and Information Science, is acutely aware of the changing roles of librarians and information specialists. In her keynote article, she provides a definition of the situation and lays the foundation for the rest of the issue.

One of the major atypical careers is that of library consultant. Raymond Holt, with a background of many years of successful public library administration and part-time building consulting, took the plunge in 1970 and became a full-time consultant. His thoughtful paper on consulting as a career suggests many avenues and explores in depth the talents and personal characteristics needed for success. While he specializes in building projects (most recently, the new public library in

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Anchorage), he has had a variety of experience and can take a broad view of the whole concept.

Judith Houk and Beth Horner are part-time librarians and part-time free lancers; the first as a general information specialist working primarily with small businesses, the second as a specialist in storytelling for all age groups. Both address the problems of balancing the demands of conventional employment with those of self-employment, with due attention to the ethical questions presented by both roles.

The next four articles address special applications of librarianship. The first article in this group is by Alice Norton, who is the only professional librarian who is also an accredited member of the Public Relations Society of America. After a consulting career of sixteen years, she is recognized as a leader in this all-too-often neglected field. Norton points out the desirability of library public relations being handled by librarians, and suggests ways for beginning professionals to acquire expertise and experience.

Aline Fairbanks, a reference librarian of considerable experience and reputation, recently left the world of academic librarianship for what many will perceive as a special library position. Yet, while her reference service might be considered traditional in many ways (the firm for which she works offers such specialized services as forensic engineering and product safety research), her work seems to go beyond the usual special library boundaries. The combination of skills and knowledge—involving engineering, medicine, law, business, history, and many other fields—is formidable indeed.

The next author has reversed the process. Now working in an academic setting, Linda Panovich-Sachs spent three years with a database publishing firm. During much of this time she was marketing coordinator, a position which required constant contacts with librarians in both public and private sectors, a high degree of technical knowledge, and skills in communication and marketing. Her emphasis is on the promotion aspects of her job, how they resemble those of conventional librarianship, and how they vary. She, too, offers helpful advice for the would-be product promoter.

One point that all of the earlier authors allude to in one way or another is that consulting is a business. For some, it represents the application of business techniques on behalf of an employer; for others, it represents the primary, if not only, source of income (unless one or another of our authors is a Rockefeller traveling incognito!). If managers of conventional libraries have learned anything in the last few decades, it is that business management techniques are essential for the successful operation of not-for-profit as well as for-profit institutions.

James and Lynda Leach, respectively a professor in vocational and technical education and an academic reference librarian, have collaborated on a paper on managing an information business. Ray Holt addresses many of the same problems in his paper; the papers complement each other.

For several years, F.W. Lancaster has been predicting the end of the library as a formal institution—but not the end of the librarian and information specialist, who will thrive as a sort of consultant. It seemed appropriate in planning a program on atypical careers to seek his views on the education of librarians for this newly “deinstitutionalized” profession. He calls for the continuation of a number of traditional skills—and the addition of a number of new ones.

Gerald Shields, a frequent commentator on the profession and its needs, suggests that, in recognizing the need for and growth of atypical careers, we may finally have arrived at the true nature of the profession. He, too, points out that “traditional” approaches to the education of future librarians will be even less satisfactory to meet the needs of the profession than they have been in the past, and offers some directions.

Finally, for those interested in further reading on this topic, Patricia E. Lowrey offers a brief bibliographic essay on some of the most comprehensive materials available on the fee-based information industry, planning for atypical careers, and directories of information brokers.

We are indebted to our contributors for their papers. While we regret the loss of the opportunity for discussion among the contributors and those who might have attended the institute, we feel that the full set of papers provides considerable background for a number of fascinating, immensely useful, and satisfying “atypical careers.”

# The Changing Role of the Information Professional

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TONI CARBO BEARMAN

THE TERM *information professional* is preferable to the term *information manager* because it connotes a broader meaning describing professionals involved in all segments of the information transfer chain—from generation to use. In the last two decades many changes have taken place in the roles of information professionals. Seven broad areas of change are of particular interest.

## Role as Part of the Information Transfer Chain

The first of the broad changes is that the information professional's job is seen as an integral part of the larger information transfer chain, and this part increasingly interacts with other segments of that chain. The information transfer chain is traditionally seen as going from author to presentation at a conference, to publisher, abstracting and indexing services, libraries, online vendors, information-on-demand companies, and to the end user. Over the years, there has been increasing interaction and cooperation among groups within the information community, including sessions at other associations' conferences, joint sessions, and discussions between database producers and vendors, and among database producers. Recently we have gone past this interaction to a blurring of lines between the elements of the chain. Some database producers are retailing their databases, instead of wholesaling them to vendors. Some producers are developing software packages, such as the Institute for Scientific Information's Scimate and the Information

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Toni Carbo Bearman is Executive Director, National Commission on Libraries and Information Science, Washington, D.C.

Access Corporation's Search Helper which provide user-friendly interfaces—menu-driven search systems for ultimate users, rather than intermediaries. Information professionals who want to work for a publisher may find they are called upon to help acquire databases, develop new products, develop indexing systems, or perform any number of tasks not traditionally associated with publishing. As the segments in the information transfer chain interact, the professionals working for those segments are called upon to perform new and different roles.

### **The Need to Harness Technology and Management Tools**

The second major change area is the challenge of learning to use many new tools to improve job performance. Of course, among these tools are the various new technologies, which eliminate much of the detailed drudgery of processing and repetitive tasks, freeing time for more challenging work, such as reference and information analysis.

Microcomputers, videodisk, and optical disk are helping to make the organization of materials, storage, preservation, delivery of documents, and access to them much easier. Some of the most exciting developments are in the technologies. Other important tools are management skills, such as strategic planning, budget analysis, and interpersonal communication skills. The availability of software packages for planning, managing and forecasting makes a difficult job much easier. Teleconferencing has improved communications and saves time. Office automation, especially electronic mail and the introduction of executive work stations, is increasing productivity of managers. These are just a few of the many tools available to the information professional. The challenge is to learn to use them effectively and efficiently.

### **The Shift to Individual-Oriented Information Services**

The third change relates to entering Era IV of our age of information. In the A.D. Little, Inc., report for the National Science Foundation (NSF), *Into the Information Age* (Chicago: ALA, 1977), Vincent Giuliano describes three eras of information. The first refers to subject-oriented information needs filled by discipline-based services, such as *Chemical Abstracts Service*. The second is the mission-oriented era in which information services were developed to assist missions, such as putting a man on the moon. Giuliano contends that we are now in Era III of problem-oriented services which are designed to help solve problems, such as the energy shortage or pollution. I believe that we are entering Era IV of individual-oriented or customized information servi-

## *Role of the Information Professional*

ces. We are designing and repackaging products and services for individuals, either at home or in business and industry. This era introduces exciting new challenges for information professionals, to identify individual user's needs, develop new products, and market and sell them. Delivery of information to home-bound citizens, and the packaging of information for the scientist in industry are just two examples of these services.

### **The Need for New Directions in Education**

The fourth change, the need for new directions in education is self-evident. In such a rapidly changing field, educating future colleagues, sharpening skills, and keeping up with new developments are essential. The Department of Education's study on *New Directions in Library and Information Science Education* should provide insights into what is needed to educate and train our future colleagues. Continuing education is needed both for practicing information professionals and library educators. It is also needed for library users, who are called upon to adapt to the many changes and new services available. Educators need to have well-funded sabbaticals to return to practical experience every few years. All information professionals should remember that they, too, are educators.

One example of an effective cooperative project which may lead to new directions in continuing education and, it is hoped, to a program involving graduate education also is a new program initiated by the National Commission on Libraries and Information Science (NCLIS). NCLIS is now involved in a pioneering program with IBM in which IBM has loaned NCLIS two information professionals to examine both the anticipated information environment of 1985-1990 and the impact of information technology on various segments of the population. These information professionals will also help identify those qualities that make technology more useful and acceptable. In a related project, IBM and NCLIS are working with the Drexel University College of Information Studies to develop a program that will encourage bright young students to enter the information field by providing an opportunity for work experience in industry. NCLIS is also currently examining ways to encourage companies to establish exchange programs with library and information schools. Cooperative projects among educational institutions, commercial companies, and government agencies at all levels are one way of expanding education programs.

### **The Changing Image of the Information Professional**

The fifth change in our role is that information professionals are being taken more seriously. In part because of the growing awareness of the importance of information in today's world, publicized through the media, the information profession is being seen as a profession similar to law and medicine. The business press is filled with articles about the need for skilled information workers and the growth of the industry. This should help both the public image of the profession and the self-image of those in it.

### **Ethical Commitment**

Sixth, there is a change in the ethical commitment of information professionals to society. This happens in many professions as each field evolves, but some of the issues being raised, such as censorship, are speeding this process. Information professionals need to continue to confront the issue of ethics in such areas as confidentiality of data and censorship. Because they work with information, which is a very powerful resource and tool, information professionals must safeguard personal and organizational data contained in files, and confidential data about the nature of requests and searches. Perhaps a "Hippocratic oath" is needed for our field. Information professionals have a very powerful and responsible role in society, and they must ensure that they continue to fill that role in an ethical manner.

### **Increased International Awareness**

Finally, information professionals are becoming increasingly aware of international information issues and the implications of them for their work. For example, transborder dataflow concerns and issues of reciprocity are being discussed widely in the library and information literature, as well as in the business and popular press. Several organizations have active international groups, such as the American Society for Information Science's Special Interest Group on International Information Issues or the American Library Association's International Relations Round Table.

### **Implications for Education**

What implications do these seven roles have for library and information science educators? One obvious implication is the need to

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rethink our curricula and entrance requirements. If we set out today to design a curriculum to educate information professionals for the 1980s and 1990s what would we put in it? Courses on organization theory, financial planning, strategic planning, and effective communications should be included. Much more interaction with business schools and departments of communication is also important.

A second implication is the need for increased resources to provide adequate hands-on experience for students, not just in searching databases, but in using microcomputers, participating in teleconferencing, and working with videodisks. Laboratory facilities, equipment and budgets for online search time may not be adequate to meet tomorrow's challenges. Increased cooperation with private sector groups can help. Why not a personal computer for every student and faculty member in every graduate school of library and information science?

A third implication is the need for increased continuing education of practitioners and for those teaching in our graduate schools. Many library schools lack sufficient funds to provide for participation in professional meetings, workshops and continuing education programs. It is becoming increasingly difficult to recruit faculty to teach in the information field because of competition from higher salaries in industry. This problem is likely to become exacerbated rather than alleviated. Cooperative projects with the private sector, both for-profit and not-for-profit, may be needed to get part-time faculty in some areas. Exchange programs and sabbaticals are needed. The mutual sharing of information and expertise should be beneficial to both educators and practicing information professionals.

A final implication is the need to increase participation in international programs, such as student exchange programs, new courses on international issues, and speakers from outside the United States. Library school faculty should be supported in programs to broaden their international experience and attend conferences or work outside the United States.

These changes in the role of the information professional and their implications for educators raise more questions than they answer, but it is important for these questions to be addressed and discussed. Continued, and increased, interaction among educators, practitioners, and professionals in related areas, such as business schools and computer science departments, should help produce answers to these questions. Information professionals are adapting well to these changing roles and will continue to meet the challenges ahead.\*



\*NOTE: The views in this paper are the author's personal views and do not necessarily represent those of the National Commission on Libraries and Information Science or the U.S. government. This paper is an adaptation of presentations made at a conference cosponsored by the Information Institute, International Academy at Santa Barbara and the Association of American Library Schools, 6-8 May 1982. (*Education for Information Management: Directions for the Future*, edited by Eric H. Boehm and Michael K. Buckland, pp. 19-22. Santa Barbara, Calif.: International Academy, 1983.) The paper also contains presentations from the 73rd Conference of the Special Libraries Association, June 1982. (This paper was originally published in *Readings in Technology*, edited by Nancy M. Viggiano, pp. 31-35 and is reprinted with the permission of the Special Libraries Association.

# Library Consultant: Career or Dead-End Job?

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RAYMOND M. HOLT

AS ONE EARNING A LIVING as a self-employed library consultant, I receive occasional letters from would-be library consultants. These letters open interesting windows on the perceptions others have of a miniscule branch of librarianship. Some endow it with glamour and even lucrative benefits. Others question whether it is worthwhile; a few wonder whether it has a future. Most, however, want simple directions on how to enter this curious—if not mysterious—line of endeavor from wherever they happen to be on their personal career ladders.

Recognizing that this is not supposed to be an encyclopedic treatment of this subject, I would like to share what, at best, must be considered personal—and therefore very prejudiced—views. I have gone to no length whatsoever to research or document the points I want to make (horrors!), but offer them strictly as one individual's commentary based solely on a career of some thirty-five years in librarianship with about one-third of that as full-time library consultant.

One further confessional note: I never had any conscious intentions of becoming a library consultant—this career somehow evolved, a little like Topsy, until it seemed a choice had to be made between continuing work as a library director and consulting. To me, the choice seemed obvious and there are no regrets. But it would be a grave error to assume the path I have followed is either typical or desirable for others.

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Raymond M. Holt is President, Raymond M. Holt & Associates, Del Mar, California.

## Motivation

When others talk about the possibility of becoming a library consultant, I usually find their motivation illuminating. Quite often their comments are based on their perceptions of library consulting as a career. Here are some characteristics named in recent inquiries I have received:

1. The work is never boring—always filled with excitement and interest.
2. Income for library consultants is substantially higher than that of most salaried librarians.
3. Consulting provides opportunities for extensive and enjoyable travel—at someone else's expense.
4. Assignments give consultants complete independence to do as and when they please.
5. Increased professional recognition is virtually guaranteed.
6. Consulting offers a practical solution to tough career choices ranging from dead-end jobs to mid-life crises.

Seldom are concepts such as *service* or *help* mentioned among these inquiries. To paraphrase, most ask only what the profession can do for them—not what they can contribute to library service. It would be unfair, of course, to deny that all of the stated perceptions are erroneous. But more on that subject later.

## Character Traits

Before discussing some of the more obvious aspects of the consultant's career, I would like to identify some of the characteristics which, from my observation, seem to be important. These begin with certain character traits which are presented here in no particular order. Actually, their relative importance depends upon time, place and circumstance.

*Tact.* Tact is the ability to discern what is appropriate to do or say when dealing with others. Without a full measure of this capability, the library consultant will find it difficult—if not impossible—to create and maintain an adequate working relationship with the client.

*Sincerity and honesty.* The successful consultant's practice is built on the innate sincerity and honesty of the practitioner. Clients place an unusual degree of trust in the consultant's ability to analyze difficult situations, evaluate alternatives and make appropriate recommendations. Often the end result produces major changes in the organization,

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affecting the status, income and even the future careers of numerous human beings. Likewise, implementation may involve expenditure of sizable sums of money for systems, staff, land and buildings. Obviously, those who would be dishonest or insincere have no place in such positions.

*Patience and understanding.* Patience and understanding seem to be twin traits that every client tests. Patience is challenged by contracts slow to be written, information which comes in bits and pieces, project timetables that change without warning and without consideration of the consultant's other commitments, and personalities which sometimes try one's temper and soul.

The consultant's capacity for understanding is often tested first by trying to comprehend the client's requirements. Often these requirements are poorly articulated, sometimes misconceived and frequently obscured by secondary or unrelated issues. The accuracy of interpretation of information and the validity of one's eventual recommendations depend heavily on understanding both the stated needs of the client and the political climate within which the client must function.

*Self-discipline.* The lack of a high degree of self-discipline goes far to account for the 95 percent failure rate attributed to general consulting—library and all other types. One must be a self-starter with sufficient willpower to see each job through to the end. The unpleasant tasks must be done, as well as the ones which are more appealing—there's usually no one to delegate the hard jobs to. For the consultant, the fifty-, sixty- or seventy-hour, six- and seven-day work week is the norm—clock-watchers need not apply!

*Ability to create/innovate.* To a considerable degree, the consultant's success depends upon creating solutions for difficult situations and finding innovative ways for handling recurring problems. This requirement mandates keeping up with technological changes and adapting and transferring solutions from one field to another. Incidentally, providing creative and innovative solutions means introducing change and this, in itself, involves an element of risk which the consultant cannot avoid.

*Perceptive and intuitive capacity.* Consultants must have the capacity for perceiving that which is not obvious. Some of the most critical factors in many assignments emerge from intuitive perception rather than from hard facts. Lacking intuition, the consultant may struggle unsuccessfully to identify the source of a problem or to create an acceptable solution. Hidden agendas, suppressed attitudes and other bugaboos more often than not must be sensed from nuances of casual conversations rather than from other sources. Like an investigative

reporter, the consultant must know how and when to ask the right questions without upsetting those providing the information. Intuition and perception must then combine to produce an accurate and inciteful understanding of what has really been said.

*Commitment and self-esteem.* A successful consulting practice requires an unusual degree of commitment of self and of personal resources. The individual must have sufficient self-esteem to trust his/her own judgment. The consultant must be committed enough to continue when conditions are adverse. Commitment may be a particular problem for those who maintain full-time jobs and practice consulting on the side: How well can they serve two or more masters?

*Sense of humor.* Possessing a sense of humor and retaining it under a variety of circumstances are essential qualifications. Taking oneself too seriously is a sure road to difficulty. Delays, unexpected barriers, personality quirks among clients, surprises—not always pleasant ones—and sudden, sometimes arbitrary changes in project scope and/or schedule are but a few of the situations which are best met with a sense of humor.

*Love of people.* Much of consulting practice turns on the ability to establish, maintain and utilize a good working relationship with people. Unless one enjoys people in all their endless variety, don't become a consultant! The greatest single reward in our practice has been the numerous friendships which have resulted across the nation. Without the love for people, a consulting practice would have no heart. Surely it would be a sterile, boring and empty career.

*Persistence.* Persistence, which is an outgrowth of self-discipline, must be numbered among a consultant's prime qualifications. All outsiders' assumptions to the contrary, a consultant must accomplish many tedious tasks—from compilation and analysis of endless data, to writing and editing reports that seem dry and repetitious. Dogged persistence is required to meet deadlines which may have been unrealistically established by the client or assumed by the consultant before a full knowledge of project complications was realized. Lengthy literature searches must be made and endless interviews conducted. Through it all, the consultant must persist in order to meet schedules and to fulfill the scope of the contract. At such times, persistence becomes a test of the consultant's character and commitment.

## **Education and Experience**

“What sort of education do I need to become a consultant?” and “Where should I get the experience needed?” are two questions fre-

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quently raised. As to the first, I have yet to work with a potential client who has had more than a casual interest in my scholastic background. Perhaps it is taken for granted that one would not enter this field unless proper credentials had been achieved. Are multiple master's degrees or a doctorate advantageous? No doubt there are situations where this is true. However, my clients are more interested in my making the effort to keep up to date in relevant fields.

Speaking of formal education for library consultants, this is an area not yet addressed satisfactorily by our profession. Neither is there any provision for formally approving, licensing or accrediting consultants. Sorry, no impressive certificate or license to frame and hang on the wall! So much for educational credentials.

Experience, on the other hand, is the subject virtually every client is *most* interested in. In fact, consultants largely are chosen because of their records for solving clients' problems. Would-be clients are certain to ask the consultant for a descriptive list of representative projects. Former clients are then asked to comment on such questions as:

1. the ability of the consultant to establish and maintain a satisfactory working relationship with project personnel;
2. the nature and effectiveness of the consultant's proposed solutions;
3. the ability of the consultant to perform project assignments on time and within the project budget.

Gaining the required breadth of experience on which to base one's reputation is a perplexing "chicken-and-egg" question which all would-be consultants face. Since formal coursework is not available, those who wish to enter this field usually do so by seeking small assignments, often at very limited fees, and gradually working up to larger projects. Some find it possible to serve informally as an apprentice to a consultant with an established practice. This works especially for those who can offer unusual skills and knowledge in some specialized field. For instance, from time to time we have used individuals from such areas as automation, video technology, and library service to the Spanish-speaking. The crucial fact, to paraphrase John Houseman is that "consultants acquire their reputations the hard way—they earn them."

### **Other Qualifications**

For those seriously considering becoming consultants, certain other qualifications should not be overlooked.

*Specialized Knowledge.* By and large, every consultant is a specialist in something or other. It is this expert knowledge and experience which others need and will pay for. Consultants' potential for success will be conditioned by their ability to isolate and market their expertise.

*Financial Resources.* For those expecting only to work as a part-time consultant, this point will have little meaning. However, for those contemplating leaving the security of the regular salary for the promising but sometimes elusive rewards of consulting, I will repeat the advice a consultant in another field gave me when I was at this same crossroad: (1) have at least one full year's work under contract before signing your termination papers; and (2) expect the first three to five years to be slim ones.

While consultant fees—or at least the hourly or daily rates—may appear lucrative when compared to salaries, remember that there are often delays and gaps between projects—and between payments, as well. Meanwhile, office and personal expenses continue unabated. Banks are not prone to accept a consultant's prospects for future projects as good loan collateral—let alone for cash deposit. Months may pass between receipt of request for a proposal (RFP) and the final decision of the responsible body—let alone receipt of a signed contract and the initial payment. Meanwhile, the cost of doing business continues as you pursue new leads, knowing that you cannot afford to depend on the promise represented by any given proposal. Further, even when the contract is signed, there are project start-up costs, travel expenses, and other expenditures which may not be reimbursed for some time. And then there are the delays in payment over which the client has no control—delays which can stretch into several months. Needing sufficient financial resources to survive these cash shortfalls is a sobering reality.

*Adequate Time.* For those wishing to begin consulting on a part-time basis, consider seriously how much time you can and are willing to devote to consulting. I have already indicated that the full-time consultant works long hours—and so does the part-time consultant. You are fair neither to yourself nor to your client if you cannot devote sufficient time to the project. Are you willing to give up your evenings? weekends? holidays? vacations? Most surely this will be necessary. Is your schedule flexible enough to meet changes in clients' requirements on short notice? Can you do justice to your full-time job while devoting time, energy and mental and physical resources to this outside work? Only you can decide how much you are prepared to sacrifice.

*Good Health.* "Availability" is almost a synonym for "consultant" to many clients, and it depends upon maintaining a healthy mind and

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body. Field trips are apt to be both long and intensive—the eight-hour work-day is seldom observed. Some days require sitting for endless hours—not always in comfort. (After a field trip with us, a colleague volunteered that the prerequisite for consulting is withstanding interminable sitting.) Travel will add its own strain to the regimen, as will numberless, undistinguished restaurant meals and an endless succession of forgettable hotel rooms. And then there's the fatigue that accompanies having to be on top of each situation at all times. Let me illustrate with the log of an all-too-typical week in our own practice.

Sunday: Left San Diego at 7 A.M. and arrived at our destination at 7:55 P.M. Nearly six hours were spent flying and the rest were passed in three airports making transfers. Incidentally, three hours were lost due to time-zone changes.

Monday: Arrived at client's office at 8 A.M. for initial session, reviewed project schedule, finalized field trip requirements and interview schedule, and became acquainted with staff principals. Ate a carryout lunch following an extensive tour of building and grounds. Adjourned for dinner at 7 P.M. (with client), then continued work through 10 P.M.

Tuesday: Similar schedule, except that after dinner, the client representatives went to their respective homes while we returned to our room to review data gathered that day, create lists of information still needed, and revise the next day's work schedule accordingly.

Wednesday and Thursday: Similar schedule.

Friday: Return to San Diego; while en route we recapped data gathered and listed tasks remaining to be done.

Saturday: Read the stack of accumulated mail, deferred telephone calls, and began preparations for a three-day field trip the following week to work with another client nearly 1000 miles away in the opposite direction. This trip will include formal presentations to a library board and a city council, followed by media interviews and negotiations on a contract amendment.

Keeping such a pace, not the least uncommon among consultants, means retaining one's health in spite of long hours, fatigue, stress, shifting time zones, and changes in climate. One-third of our time was spent last year in field work—and nearly 100,000 miles were flown. Enough said about the health requirement.

*Ability to Write.* Whether inherited or acquired by dint of training, a consultant must be able to put his or her findings and recommendations into acceptable prose—and with some rapidity. A well-written and meaningful report is much more apt to be read and implemented. Since the final report is almost always the most lasting and tangible evidence of the consultant's contribution to a project, the importance of good writing skills seems self-explanatory. This skill must be honed so that



drafts can be kept to a minimum, there being little time for extensive rewriting.

*Communication Skills.* In virtually every area of library consulting, communication skills are basic to success. Such skills begin in the marketing of consulting services. Often this process begins as a response to an RFP—a formal request for proposal. The written response indicates the consultant's ability to analyze client needs and to respond in a meaningful way. If interviews of prospective consultants are involved—and often they are—the consultant's communication skills must compete with those of others seeking similar consideration. Where consultants' qualifications are similar, the assignment is most apt to go to the consultant who makes the best impression during the interview.

Once the project has been awarded, fact finding will again depend upon the consultant's ability to communicate with staff, public, officials, and others. Using communication skills will play a decisive role throughout the project and culminates in the final report phase, where the client must be convinced that the findings are reasonable and that the recommendations are worthy of implementation.

*Objectivity.* The consultant must retain a sense of objectivity when dealing with data and situations. While local conditions must be understood, including biases and prejudices, these cannot be allowed to warp findings and recommendations. The client is paying for an independent appraisal. (If the client wants only the consultant's endorsement of his or her own perceptions, opinions and solutions, beware!) Among other things, this means adherence to the stated goals of the project and avoiding tangents which, however intriguing, are not germane. Strong personalities encountered during a project can exert undue influence on the outcome if the consultant fails to retain a firm sense of objectivity.

*Perspective.* Clients expect consultants to maintain an exceptional amount of perspective. This is akin to objectivity. Those closest to the local situation often have shortened perspectives and cannot view problems and solutions in the long haul. Therefore, the consultant must be able to show how solutions may relate to the immediate concerns of the community and to the continuum of the library's development. The ability to provide this perspective is one of the consultant's unique contributions.

*Keeping an Open Mind.* Implicit in much of the foregoing discussion is the need for the consultant to keep an open mind. No matter how similar projects may appear to be, one must resist the effort to reach conclusions without sufficient confirming evidence. No matter how subtle, differences in circumstances may make it impractical to transfer the solution from one project to another. For one thing, the structure

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and demographics of a library's community—as well as the characteristics of a library's collections, staff, programs, etc.—are apt to differ among libraries more than the uninitiated may realize. Political realities will also vary widely. Therefore, the consultant must keep an open mind until fact finding and analysis have produced the full range of possible alternatives.

*Home, Family and Travel.* Travel is one of the “givens” of most library-consultant practice. However, contrary to what some might suppose, exotic destinations and sightseeing are a rarity on most consultants' itineraries. True, travel can be fun—but, as already noted, it can also be grueling. Would-be consultants must seriously consider the effect frequent absences from home may have on them—as well as on their families. Inevitably, consultant's social and recreational life is held hostage to the client's needs. Trips may range from overnight to several weeks. Intervals at home are sometimes too short for anything but repacking for the next field trip. Since travel schedules are usually determined by the client's needs and convenience—not the consultant's—disruption on the home front is almost certain to occur. Some consultants and their families are willing to accept this—others cannot.

### **Special Skills**

Special skills of some kind are needed in virtually every field of library consulting. To be salable, these must usually exceed the level of similar skills otherwise available to the prospective client. For instance, the automation consultant will want to have developed programming skills and familiarity with the major computer languages—something few librarians have time or opportunity to learn in any depth. Consultants dealing with community analysis, levels of library service, and long-range planning will need some skills in sampling and statistics. Public relations consultants undoubtedly will have honed their journalistic abilities and will be able to show published work as evidence of their skills. Library-building consultants must have a familiarity with building codes, be able to read and interpret architectural and engineering drawings and specifications, and must be able to visualize two-dimensional representations in three dimensions.

Skills can be learned in various ways. However, it is my impression that few library consultants set out to acquire such skills in anticipation of becoming a library consultant. Rather, most gain skills for other reasons, usually job-related. Then, because others recognize their expertise, such individuals are asked to “help out” by taking on consulting

assignments. If the some-time consultant finds the work agreeable, additional classes, self-tutoring, attendance at professional workshops and institutes will serve to broaden his/her skills and will keep them sharpened to a working edge.

### **The Library-Consultant Marketplace**

Having delineated some of the characteristics and requirements for the library consultant, as I see them, perhaps it is time to consider the existing marketplace. In recent years, shriveling budgets and shrinking programs have reduced, but not eliminated the market for consulting. Here is a quick overview of some of the areas which remain active in spite of the recent budget blitzes.

*Automation.* Automation is probably the number-one field of activity for library consultants. It presents the classic case for seeking help in a highly complex field where local expertise is not sufficient. A number of very busy consultants are rushing about the country to share their expertise—all the while gaining valuable experience and contacts for use in the future. Most of these individuals have considerable background in automation, whether they have library degrees or not. With only a small fraction of our libraries automated and with the possible applications growing as mini- and microcomputers enter the field, it is probable that qualified consultants in this subject will face a project backlog for some years to come.

*Video services.* Video technology is also beginning to make an impression on the library world. Here, again, is an example of a sophisticated and fast-changing technology which libraries must tame and use. For the foreseeable future, expertise greater than that locally available will be needed in many library situations. Video consultants are emerging from the video technology field as well as from the ranks of library audiovisual specialists. Video consultants see studios, video-cassettes and video disks replacing many other audiovisual formats. I suspect that video consultants will be around for some time—especially those trained in production facilities and programming.

*Public relations.* There is tangible evidence that libraries recognize the need for individuals who specialize in the art of public relations (PR). Perhaps it is an acknowledgment that libraries must develop and maintain a new image if they are to reach their stated goals. Most librarians now realize that good PR means much more than an occasional newspaper article or book-review column. Consultants in this field include those with library backgrounds as well as others. This is an

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area of perennial interest in which a certain number of well-qualified consultants will always find a demand for their services.

*Personnel.* Personnel was a very active field for library consultants a few decades ago when personnel administration first became an area of concern. Specialists in demand were capable of writing job specifications and creating classification and pay plans. A few are still doing business, but the focus tends to center on unions, labor relations, and similar subjects. With the build-up of personnel departments by governmental agencies, academic institutions, and others, the expertise formerly provided by the consultant is available in-house. However, it would not be surprising to see a resurgence in this area. The individual trained as a librarian but cognizant of current personnel philosophies and techniques may find this an adequate market.

*Library management.* Opportunities for library management and operations studies have lessened somewhat in recent years. This decline probably is due more to the lack of funds than it is to the cessation of managerial problems. Even in these years of curtailed budgets, however, libraries here and there have retained library consultants to help streamline operations, reduce costs and increase productivity. In some cases, the library-management consultant has been replaced by the management consultant firm using a systems approach with multiple disciplines, computerized databases and a host of other tools too sophisticated for most library consultants to compete with. Moreover, the library is frequently lumped with other departments within a given agency and may be studied as part of the total organization rather than as a distinct unit. Except for the isolated library, therefore, it would appear that general library management may offer less growth than some other fields for the would-be consultant.

*Library systems.* When library systems were a new concept, consultants frequently were called in to prepare feasibility studies, propose organizational plans, study plans for providing system-wide services, suggest goals and objectives, and to examine or create intra-system and inter-system delivery and communication alternatives. Like library-management consulting, this need seems to occur less frequently now. However, as systems stabilize and develop, it is likely that there will be periodic need for outside assistance in making evaluations and in preparing long-range plans. Increasing numbers of systems are multi-type, giving some advantage to the consultant with varied experience.

*Collections.* Though still few and far between, more libraries appear to be retaining consultants to assist in collection evaluation. Academic libraries, in particular, experience occasional need for this

service as part of their preparation for accreditation. The ability to relate collections to library and institutional goals is particularly important here. Experience should include extensive service in collection development and materials selection.

*Buildings.* Library-building consultants probably have achieved a higher visibility than most others. Use of consultants on building projects—while far from universal—is sufficiently common to have gained some recognition. Experience, once again, is the primary qualification. Competition for the limited number of jobs is often strong. Consultants on building projects may prepare or assist in the preparation of the building program. Their services may or may not include review of drawings and specifications during the architectural development phase. While the consultant is usually retained by the library, architects sometimes engage a library building consultant. Building consultants may also prepare facility feasibility studies, assist with site selection, review existing structures to determine how space utilization can be improved, or evaluate nonlibrary buildings for possible reuse as library facilities. While most building consultants are librarians, a few architects have chosen to compete in this field. The market for library-building consultants seems to be gaining strength now, after a number of years when money for construction was nearly nonexistent.

### **The Library-Consultant Business**

Whether conducted on a part-time basis or as a full-time career, consulting is a business—make no mistake about that! Further, the library consultant, for whatever time he/she may be involved in this practice, is self-employed, with all the advantages and requirements thereof. This includes mandatory filing of tax returns, considerable bookkeeping, and maintaining an office of some kind with appropriate supplies and equipment. Consultants who find it desirable to supplement their own skills must identify and hire individuals with specialized skills to serve as subconsultants. Most consultants must also have access to typists and others with secretarial skills. Once a payroll is created, the complexities of the business begin to increase. Perhaps this is why so few library consultant practices grow to any size.

To be a successful consultant, one must understand and be able to compete in the marketplace of his/her chosen field. Usually, this means becoming involved with at least the following:

—*Advertising availability.* Not so long ago it was considered unprofessional—if not unethical—for consultants to advertise their

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services. Now, some consultants advertise openly and *American Libraries* each quarter provides a special section of its classified ads for this purpose. Still, the majority of consultants have yet to use this means of gaining recognition. Rather, there continues to be a strong tendency to assume that recognition should come from projects which have been completed and from participation in professional activities—including writing for professional journals, speaking at workshops, and appearing on programs. This being the case, a consultant must seek opportunities to gain visibility in professional activities where potential clients are most apt to assemble.

Other means of getting attention also exist. For instance, in the case of library building consultants, a list of those meeting certain limited requirements is issued periodically by the Buildings and Equipment Section through the ALA/LAMA (American Library Association/Library Administration and Management Association) office. Copies of the list are sold to librarians, architects and others requesting information on library-building consultants. A similar list is being prepared for those in public relations; likewise, lists may be forthcoming in other specialized areas in the near future. Meanwhile, a limited number of library consultants are included in more general publications such as the *Consultants and Consulting Organizations Directory* published by Gale Research Co. However, the extent to which such information is actually used is unknown.

—*Getting jobs.* Occasionally consultants are retained directly. However, in most cases, the standard procedure is for the client to issue a request for a proposal (RFP) to a number of prospective consultants. Making certain that one is on the list to receive such RFPs is obviously important. Of course, this relates directly to the foregoing discussion on advertising one's skills and availability.

After receiving the RFP, a major effort must be made in analyzing the prospective client's needs and presenting these in the form of a proposal. Such a proposal will be subjected to intensive critical examination and must strictly adhere to the format and other requirements set forth in the RFP. While trying to make one's proposal distinctive, sight must not be lost of the necessity for addressing every question posed by the RFP. When competition is stiff, proposals are often eliminated because of "noncompliance" regardless of how much experience the individual may have or how well his/her proposal may match client needs.

After the client has received the proposals, they are carefully reviewed. The best of the proposals are then selected as a "short list," for

further consideration. Depending on the number short-listed, this may include interviewing. If interviews are to be conducted, the short list is apt to be narrowed to three to five proposals. The interview team will review the consultant's qualifications, experience and details of his or her proposal. The consultant will be asked to clarify any points about which there may be question. Occasionally, the consultant may be asked whether or not he/she will consider making modifications to the proposal—sometimes to the price. Usually the choice of consultant is made some days or weeks following the interviews. Before leaving this subject, perhaps it is important to note that the consultant will probably pay his/her own travel expenses for the interview. Clients more often than not assume this to be a normal part of the consultant's business expenses.

Once the interviews have been completed, the client determines which of the consultants is to be retained. Sometimes this requires making changes in project scope or schedules.

—*Negotiating contracts.* Having the project assignment, the next critical part of the consulting business is negotiating a contract. Most client agencies have an attorney or contract division to assume this responsibility. However, since many of these people are unfamiliar with the retention of consultants, considerable attention must be given the negotiations and the contract to be certain that it provides reasonable protection for the consultant as well as covering the client's interests. A course in business law and access to an attorney experienced in contract law can be helpful—and sometimes essential for self-protection. Normally an entire project is apt to be completed without reference to the contract. Nonetheless, upon occasion the wording and provisions of the contract must be enforced. Hence, the need for clarity and full understanding of contract terms.

Contract negotiations may be accomplished in a few hours or they may take many weeks. Contracts may be as simple as a letter of agreement and as complex as a many-paged document filled with legal language and previously unfamiliar provisions. Oftentimes it is not until contract negotiations are well underway that it will be mandatory for the consultant to show evidence that he/she carries specific types of insurance at given amounts and/or must post a performance bond. If a lump sum contract is being negotiated, these unexpected costs must be absorbed by the consultant, thereby perceptibly lowering the margin of profit. Once in awhile, such costs become so onerous that the consultant may find it necessary to withdraw from the negotiations.

Schedules are also set as part of these negotiations. Besides agreeing to meet the major project deadlines, the consultant is apt to be required

to provide a time schedule for each of the tasks indicating beginning and ending dates. Such schedules may use procedures such as PERT (performance evaluation review technique) or CPM (critical path method). For the part-time consultant, scheduling tasks means looking realistically at the amount of time probably required for each task as well as the amount of time available beyond the regular work week. Full-time consultants must fit the schedule for the new project into the master schedule maintained for all projects under contract. This is not always an easy job since conflicts in deadlines, field trips, filing of reports, etc. must be avoided. Each client group must have the satisfaction that the consultant is devoting appropriate time to their particular project and that schedules will not have to be reshuffled or deadlines missed because of conflicts with a full-time job or other projects.

—*Fees.* “How much should I charge?” is one of the questions frequently asked by enterprising neophyte consultants. (It is a question experienced consultants also ask themselves as the need to keep their practice profitable faces the requirement of being competitive.) The amount of the fee depends largely on the qualifications and experience of the consultant. Individual requirements differ tremendously. Some part-time consultants relate their fees to the hourly rate of their current salaries. Others maintain fees comparable to those charged by consultants in similar professional fields.

Setting fees and arriving at a bidding price for a given job are matters requiring considerable thought and calculation. Projects may be bid on a number of bases. The most common of these are: (1) charging an hourly or daily rate within a “not to exceed” figure and with reimbursable costs for travel, meals and other expenses added as a special provision, and (2) a fixed fee which may or may not reimburse all out-of-pocket expenses; if these are not included in the fixed fee, they may be covered by a separate provision detailing reimbursable expenses. The client usually chooses which method will be used. At present, library consultant fees range from less than \$100 per day to more than \$500 per day—experience and reputation usually being determinants. In any case, the problem of remaining competitive while turning at least a modest profit is a continuing challenge.

In calculating fees and preparing proposals, the consultant must be constantly aware of the unexpected expenses which may be incurred. Remember also that consultants may experience cash-flow problems, like any other business. Expenses for travel, office, etc. must be paid on time regardless of how long it may take a client to pay an invoice. (The payment period is seldom less than 30 days following receipt of invoice and 60- to 120-day cycles for bill payment are not uncommon.)



—*Doing the job.* Each client expects the consultant to complete all the tasks required to fulfill the scope of the project as agreed to in the contract. If the project is well conceived and the task requirements carefully delineated and scheduled, this usually presents little problem. However, unforeseen factors and events sometimes occur which insert new information or conditions that must be reckoned with. If these are significant, work may need to be halted until an appropriate adjustment is made in the contract amending the scope of work, tasks, fees, schedule, or other factors.

As part of the consultant's response to the RFP, the client's project is usually broken down into specific parts. Separate tasks are then established for each of these. Then a schedule is constructed which incorporates all of the tasks so that the project deadlines can be met.

Getting the project done means completing all of the required tasks. Not infrequently, tasks may need to be modified during the course of the project with some deleted and others added. If the consultant is working closely with the client, it is usually a simple matter to reach agreement on such changes. Unless the modifications require change in the fee, an informal agreement will often suffice. This should be conveyed by a letter signed by both parties, just for mutual protection.

Meeting schedule deadlines is an important aspect of the consultant business. For the part-time consultant this means a realistic assessment of the time available after completing the requirements of the full-time position. For the full-time consultant, it is a matter of determining how adequate time can be prorated among the several projects which are going on simultaneously. Particular attention must be given in either case to avoid overlapping of project deadlines, especially for the final reports.

Once the information for the project has been generated and analyzed, the results in the form of findings and recommendations must be placed in the form of a final report. (In the case of the building consultant, the final report is the written building program.) Usually such reports are far too long and detailed to interest any but those who are very close to the project. For this reason, the consultant may wish to issue an executive summary of the report or even a press release to secure wider recognition of the project results. This should be done, of course, with the full cooperation of the client.

—*Record keeping.* As noted in the beginning of this section, consulting practice requires keeping records. Not the least of these is a detailed accounting of time spent on each project, records of all phone calls, accumulation of all receipts for use in claiming reimbursable expenses,

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and use of standard accounting procedures for office expenses. Such accounts are required for filing federal, state and, in some cases, local tax and other forms. Time spent in these procedures must be covered as normal operating overhead and is not directly billable.

### **Conclusion**

So, is being a library consultant a career or a dead-end job? That all depends on the individual. For some it will appear that the negative factors clearly outweigh the positive ones—especially if job security and a regular schedule is of importance. However, for those who are more concerned about other goals and are interested in a way of life that has considerable variety, enables them to make new friends, provides opportunity for being near the cutting edge of our profession, and offers the advantages and disadvantages of being self-employed, then it is indeed a worthy career. However, such a career—either full time or part time—will be less attractive to those who want to use their available leisure time for other pursuits and/or who place a high value on income security. Obviously, since in our practice we consider new friendships and the meeting of interesting people as among the greatest rewards, we have found service as a library consultant offers a very satisfying career.

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# Definitions Without Terms

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JUDITH ANN HOUK

THE OBSCURE TITLE "Definitions Without Terms" illustrates the point that an infant industry is being defined, but that many of the people involved with that industry are struggling to come to terms with their clients, their colleagues and themselves. The nascent character of that segment of the information industry occupied by free-lance librarians is admitted in the fact that we lack an agreed-upon name. The *Oxford American Dictionary* defines a nascent chemical element as one "just being formed and therefore unusually reactive." That may define our nature.

Nomenclature difficulties abound. Free-lance librarians prefer to call themselves *information brokers*, *information consultants*, *information specialists* and avoid the term *librarian*. In 1972, I formed a company with the unwieldy name, Library Reports & Research Service, Inc. (LRRS). I chose that name with some defiance as I wanted to maintain the "library" appellation and proclaim that librarians are in the business of providing information.

The confusion of labels is manifested at the most personal level. I conducted an informal poll of several free lancers and everyone acknowledged that the question they most dread to hear is: "And what do you do?" Not one would say, "I'm a librarian." Some of the answers they described are: "I'm a consultant in the organization of information." "I obtain information for people for a fee—it's like having your own personal librarian." "We do library research for... ." "I'm an

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information consultant—we organize internal information and provide access to information.” Perhaps the most honest answer is: “I’m an information consultant—I used to be a librarian.”

After twenty-plus years in the library world, I rather regret these imprecise descriptions of our work. Free lancers know that word-of-mouth advertising is the most effective way to obtain clients. Many free lancers are developing attractive, attention-getting advertising copy and some are becoming familiar names. All of us are faced with translating that amorphous commodity, information, into a service comprehended and desired by clients.

It’s fascinating that information consultants have *clients* while libraries have *patrons*. That distinction is telling. Clients pay, patrons support. Payments from clients may be sporadic, patrons’ support is assumed to be constant.

The public/private sector pull is faced by many free lancers who “grew up” in publicly-supported institutions. As the director of a suburban library in the early 1960s, I sensed that some patrons needed intensive information assistance that could not be provided by the library staff and that those patrons might be glad to contract with an experienced librarian who would devote exclusive time to their information needs.

By the early 1970s several free-lance information services were being formed. Our stated purposes were to handle the “above-and-beyond” requests for information and to provide services not available from libraries. We free lancers insisted that our services complemented rather than supplanted those available from established libraries. Some librarians were suspicious of our intentions. There were some abrasive contacts.

In 1976 I returned to the public sector and placed LRRS on hold. For five years I observed free-lance librarians while I practiced institutional librarianship. That vantage point qualifies me to comment on some of the considerations that librarians should make before jumping into the private pool of entrepreneurs.

The *Oxford American Dictionary* defines an entrepreneur as “a person who organizes and manages a commercial undertaking, especially one involving commercial risk.” The key term here is *risk*. Since clients pay and patrons support, consultants earn fees and librarians receive salaries. That distinction applies only to the relative security, not to any divergence of quality of service between free lancers and librarians. No one has measured that relative quality of performance. Several studies have decried libraries’ inadequacy of response to information requests. None has measured the performance of free lancers.

### *Definitions without Terms*

Quality of response is an ill-defined concept with which we should come to terms.

Transitions can be difficult. Librarians considering going out on their own may be tempted to test the market by suggesting to some patrons with unusual information needs: "We can't spend that much time to get all that stuff for you, but if you meet me in the parking lot at 6:10 maybe we can make an arrangement for me to moonlight on your project." This tactic may hurry the decision to free lance.

Librarians who decide to become free lancers should heed all the good advice available in the literature—if you're going to run a business, get an attorney, get an accountant, get insurance, get organized. Read all about the pros and cons of sole proprietorship, partnerships and corporations. Choose the advice and form of organization that feel right to you. Those decisions will influence the soundness of your business structure.

Each librarian-turned-free lancer influences the impression of information brokerage held by former librarian-colleagues. To gauge the free lancer's probable effect, the consultant should consider how, as a librarian, he or she would feel about free lancers as library patrons. The free lancer's services must complement, not compete, with those offered by or for libraries.

As publicly-supported institutions are being required to recover the costs of their programs, several agencies are developing services that compete with those offered by information consultants. At a Special Libraries Association meeting in Denver recently, one free lancer described a service she proposed to offer to libraries. Simultaneously, directors of two regional library service agencies said: "We could do that." Were the market wars joined?

After walking the perimeters of both public and private sector information services and after being submerged in each, I conclude that the dog-eared image-problems of librarians still obtain. I would alert each person who is considering being a free-lance librarian to be sensitive to the fact that scrutiny of the image will come from both clients and colleagues. Because the number of free-lance librarians is small, each member of the community bears a heavy responsibility for establishing the free-lance industry's reputation.

Perhaps chivalry should provide our motto. It was those mercenary knights whose wanderings (*This Lance for Hire*) originated our generic name.

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# A Foot in Each World: Maintaining a Full-Time Library Position While Developing a Free-lance Business

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BETH HORNER

STRADDLING TWO WORLDS requires an incredible sense of balance, as well as a large amount of energy, flexibility and ingenuity. Maintaining a library position while developing a separate free-lance career can be difficult for both the individual and the library institution. However, this arrangement can also be advantageous for both parties and is a good method of making the transition from library employee to free-lance professional. In this article I will discuss the positive and negative aspects inherent in such a situation as they are exemplified in my own experience.

I am currently maintaining two professional positions: (1) Children's Librarian at the Champaign (Illinois) Public Library and Information Center. Until six months ago, I worked full-time for the library. Presently, I work thirty hours per week. As one of four children's librarians, I select materials, plan and implement programs (which sometimes include storytelling), give readers' advisory and reference assistance, and participate in providing these and other services for children from infancy through grade eight. (2) Free-lance Professional Storyteller. As a free-lance storyteller, I maintain a schedule of at least one booking per week; each booking may involve as many as four programs per day and extend any length from one day to two weeks. My programs include performances and workshops for children, teens and adults. Also, I commonly spend from two to ten hours traveling to and from each booking. All time devoted to my storytelling business is in addition to the thirty hour per week commitment to my library position.

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At this point, my career goal is like that of many other free-lance professionals currently employed as librarians: to develop my free-lance storytelling into a full-time, self-supporting business. I seek this goal for several of the same reasons that other librarians seek to develop other free-lance businesses:

- I particularly enjoy one specific aspect of my library position (in my case, storytelling) much more than other aspects.
- I see a need for this aspect of library work and see that it is not being adequately met by libraries. Although libraries devote as much time and effort as they can to this service, it sometimes is insufficient to satisfy the public demand. There is enough demand to create opportunities for a completely separate business offering this one service.
- I prefer the independence of operating my own business to working within an institution.
- Many of those creating their own businesses also see the opportunity monetary gain. I doubt that I will enjoy as high a salary as a storyteller as I currently do as a librarian, but many librarians find that those in need of other services are willing to pay more for them than the library institution.

### **Potential Problems**

The transition from library employee to independent businessperson is not always immediate. For financial reasons, one is not always able to leave the security of the steady income and benefits provided by a full-time job in an institution without having already fully developed one's independent business. Building a free-lance business is a gradual process, and therefore, one often finds oneself in the situation of building that business while still holding onto library employment. When an individual is at the point of maintaining two positions, as I am, potential problems for both the individual and the institution arise and must be dealt with.

### *Fatigue*

The largest problem for the individual is the overwhelming amount of time and energy required to maintain two jobs. I cannot emphasize enough that there simply is not enough time in a person's day to competently perform two full-time jobs. Attempting to do so often results in frustration and fatigue. Constant frustration stems from the fact that one cannot devote as much time and effort as one would like

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to either job. Fatigue results from attempting to do so anyway. Leisure time is rare or nonexistent. It is not uncommon for me, for example, to work three or four weeks in a row without a single day off. In addition, each individual day is packed. I often rise at 5:30 A.M., work two hours on my storytelling business before going to my library job, continue to work over my lunch hour and then devote another two to four hours in the evening. Weekends are almost always spent on the business, either in presenting programs or in doing paper work.

This kind of schedule can soon drain one physically, emotionally and creatively. In addition, it can wreak havoc on one's personal life. An understanding and supportive family is essential, but even a patient and flexible family will feel the strain. The library institution can suffer from this drain on the individual's time and energy as well. If an employee is overtaxed and tired, chances are that he or she will not be as alert, creative or effective on the job.

In order to avoid these potential negative effects, the free lancer must learn to budget time efficiently and must make time for relaxation. Otherwise, he or she will quickly suffer burnout. I chose to reduce my library hours to deal with the exhaustion and frustration resulting from holding the library and storytelling positions. One extra day off per week provides me with a little more time with which to conduct my storytelling business as well as some breathing room in my personal life. As a result of this change I work more effectively in both my library and free-lance jobs. However, as my independent business grows, I continue to feel the pressure to reduce my library commitment.

### *Clear Boundaries*

It is very important for the free lancer to maintain a clear boundary between the institutional job and the independent business. He or she should not conduct free-lance business while at the library and vice versa. For example, the library suffers if an employee constantly receives free-lance business-related telephone calls or speaks with clients on library time. On the other hand, the free-lance business suffers if the library expects its employee to take work home. No matter how careful the individual is about maintaining a strict separation between jobs, however, a potential problem exists. Because there is an overlap in services between the library's and the individual's independent business and because the individual is physically located at the library, the public often confuses the individual's free-lance business with his or her duties at the library and vice versa.

Several difficulties may arise as a result of this confusion. The most common problem for the free lancer is that the public often assumes that

the individual only offers those services offered by the library and that he or she does so at no charge. In my particular case, potential clients often assume that I present storytelling programs exclusively for children and that the programs I present outside of my library work hours are done so as a hobby rather than as a business. At the same time, the library experiences problems because: (1) library patrons request services from the library that the free lancer provides, but that the library ordinarily does not, and (2) patrons may request normal library services but specify that they be provided by the free-lance staff member when other staff members are equally capable of providing those services. For example, an adult organization may have heard about a librarian who tells stories, so it may call the library requesting a storytelling program. This is a service that I provide on a free-lance basis for a fee, but that children's departments of public libraries customarily do not. Confusion and ill feelings may result when such a group learns that this is not a free library service. Or a teacher may call the library to arrange for a class field trip and may specifically request that I present the library tour and program. This may cause hurt feelings among the other children's librarians because they are just as capable or more capable of providing library tours and programs to classes.

The resulting ill feelings can be avoided by maintaining open and frank communication among staff members. The staff must realize that such confusion is going to occur and must decide upon a consistent policy in order to cope with it. At the Champaign library, for example, we answer requests for nonlibrary services by consistently stating that the library does not offer the services, but that there are free-lance individuals who do. We then give the patron a few names, including my own. At the same time, we consistently respond to requests for library services to be provided specifically by me by stating that the library employs four qualified children's librarians, all capable of providing library services and that we assign such programs according to our work schedule. As a free lancer, I reduce potential confusion about my services by maintaining a strict fee policy and always clearly stating my fees and services in all printed publicity and personal contacts. At the Champaign Public Library, ill feelings also tend to remain at a minimum because the other three children's librarians are confident, capable professionals who support my free-lance work and understand when confusions arise. In addition, some confusion has been alleviated by the expansion of my storytelling business beyond the immediate community. Individuals beyond the Champaign-Urbana area do not associate me as closely with the library.

*Scheduling*

Balancing two schedules is extremely difficult for the individual free lancer, particularly when both require that much of the work be done during the normal business day. Many of my storytelling bookings, for example, require travel and on-site work. I may travel to a school system and work in it for one or two weeks at a time. Because I cannot work such a schedule around my 9:00 A.M. week-day schedule at the library, I must request vacation time before accepting such a booking. Thus, I quickly deplete my vacation time and find myself hunting for ways to obtain a day off in order to conduct my storytelling business. I must also put the storytelling booking on hold until I am able to clear my vacation request with the library's schedule. In addition, I often receive requests for storytelling jobs and find that I cannot accept because I am already committed to do a program at the library.

Another scheduling problem arises for the individual from the fact that most business transactions are conducted during normal business hours. Therefore, the free lancer often has difficulty carrying out routine business transactions such as making or receiving telephone calls. For example, because I do not initiate or receive storytelling telephone calls on my library time, I must do so before work, during my lunch hour or after work. However, I am continually frustrated by the fact that the person I am attempting to reach is only available during regular business hours and therefore is not available at the times I call. In addition, it becomes quite expensive to make long-distance telephone calls from the library when I have to then charge them to my home telephone number. This simple business routine of telephoning became such a scheduling problem for me that I finally alleviated it by putting a telephone answering machine on my home telephone for incoming calls, and reducing my library work load by one day per week, making one business day available for returning telephone calls.

The simple logistics of maintaining two schedules not only causes problems for the individual, but taxes the library administration as well. The free-lance staff member who makes repeated special scheduling requests creates headaches for his or her supervisor. If the supervisor and administration are not supportive of the free lancer and are not willing to juggle the work schedule, it may simply be impossible for the individual to maintain two positions. However, if the supervisor and the administration are willing to be flexible, alternatives to the normal work schedule can be investigated. In my own case, the Champaign Public Library has agreed to designate my position as an experimental time-shared one, thus allowing more scheduling flexibility.

Another potential disadvantage to the library is that the free-lance staff member is not going to be willing, as he or she may have once been, to occasionally take work home. Many children's librarians, for example, read new children's fiction in their personal time in order to stay current with the new literature and in order to better assist library patrons in selecting reading material. However, when one takes on a commitment as time-consuming as a free-lance business, one's priorities will be rearranged. Because the library cannot regulate the employee's nonlibrary time, it is best for the administration to work with the employee on scheduling time at work for all library-related duties. My supervisor and I, for example, arranged for me to spend the final one-half hour of each working day reading new children's literature.

### **Advantages**

Given the problems I have discussed above, one might justifiably ask why a person would attempt to maintain what could easily be two full-time jobs. Similarly, one might ask why a library would support a staff member whose goal is to develop a free-lance career. The answer lies in the fact that there are several advantages to both the individual and the library.

#### *For the Individual*

One of the most obvious advantages to the individual is the financial security provided by an institution. The institution also provides benefits such as health insurance, paid vacation and sick leave that cannot be obtained by a free lancer without significant expense. This security is particularly important when making the transition toward an independent business.

The free-lance business also profits from contacts made through library work. As a librarian, one becomes familiar with networks within the community and establishes rapport with different community members. As one develops a free-lance business, these contacts become extremely important. Quite often a person will hear me tell a story at the library and then will hire me to present an entire program for their organization or school. There is a fine line between benefiting from these contacts, however, and abusing the integrity of one's library position. One must be careful not to promote one's business at the expense of library services or the library's reputation.

By maintaining contact with fellow professionals through library employment, the free lancer also overcomes one of the biggest disadvan-

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tages of working independently—isolation. The constant professional stimulation from other children's librarians at the Champaign Public Library is extremely important to me. With them, I am able to discuss ideas, practice stories and explore new storytelling possibilities.

An additional benefit for the individual is the ready availability of current literature in the field through library employment. Through my position as a children's librarian, I read all of the current journals in the field, several of which contain information about storytelling materials and conferences and about new collections of folk and literary tales. I am also able to view the actual books, films, records and tapes as they come into the library. This opportunity is invaluable to me for keeping abreast of new story and storytelling materials. Therefore, although financial security may be the most obvious reason that one might want to maintain a professional library position while building an independent business, there are other important benefits as well.

### *For the Library*

Any library institution has the potential of becoming stagnant, especially with the current austere financial situation which makes it difficult to send staff members to professional meetings and conferences. The free lancer, traveling and working in different locations and situations, is exposed to a variety of ideas and experiences. By bringing these back to the library, the free-lance staff member introduces new ideas to the library staff, leading to the creation of innovative services. For example, the children's librarians at the Champaign Public Library recognized the current "mini-baby boom" and the increasing demand for services to toddler-aged children. Although we partially met the demand through materials, we were reluctant to initiate programs. Through my free-lance storytelling experiences, I acquired knowledge about and enthusiasm for conducting programs for two-year olds. Consequently, we have initiated story and craft programs which have been met with great enthusiasm by our library patrons. In addition, I attend many conferences and workshops at my own expense in order to improve my storytelling skills and business. My work at the library significantly benefits from the knowledge I have gained and the contacts I have made through these meetings.

Another advantage to the library is that the free-lance staff member spreads an awareness of the library through his/her independent work. I have found this to be true both within and beyond the immediate community. When I present a free-lance storytelling program, I am often introduced as a professional storyteller who is also a children's librarian at the Champaign Public Library. Time and time again, an

interest in my storytelling performance or workshop motivates an interest in the Champaign Public Library. Therefore, not only do those attending my programs associate their positive experience with the library, but many learn about its specific services as well. Thus, I am indirectly providing a public relations service for the library.

These advantages to the library can be overlooked and underestimated by a library administration that only sees the negative aspects of employing a person developing a free-lance business. They are significant, positive influences on the library and their importance should be recognized.

### **Conclusion**

Because of the problems involved with straddling two worlds—and the attendant fatigue, job boundary confusion, and scheduling difficulties—I recommend it only as a temporary transition for the individual interested in developing a free-lance business. However, if the individual is able to handle the temporary frustration and fatigue and if the library is willing to be flexible about problems that might arise, both will benefit. The individual will benefit from financial security, community contacts and professional stimulation, and the library will benefit from creative, innovative input and from positive public relations.

# Library Public Relations: New Opportunities in a Growing Field

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ALICE NORTON

## Introduction

MOST CAREERS IN PUBLIC relations include a number of job changes. Some changes are from one employer to another (perhaps to self-employment); others are from one specialty to another within the field or related fields. It is not surprising then that public relations, an atypical career within library management, offers a staff member opportunities for job changes, frequently with rewards.

This article describes some of these current opportunities and identifies some trends in the field. First is a brief overview of the beginnings of public relations and a sobering look at its present status. Then four major trends in library public relations are identified and some career opportunities are described within and outside of libraries.

No organization (including libraries) without a public relations *plan* can have an effective public relations program. In fact, most definitions of public relations include a reference to planning. For example: "Public relations is a planned program of policies and conduct that builds public confidence and increases public understanding."<sup>1</sup> Similarly, planning is one of the four widely accepted steps in the management function of public relations. The steps are: fact-finding and research, planning, action and communication, and evaluation.<sup>2</sup>

What then should a library administrator expect from public relations staff? Activities should include: continuous assessments of the

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attitudes and opinions of the library's publics (including users, potential users, groups from which the library gets its support, other opinion leaders, and the media); a planned program of communications with these varied publics (each program tailored for its particular market); and evaluation of results.

### **Actions, Past and Present**

In American public libraries, it appears that success traditionally has been accompanied by imaginative, energetic promotion. Almost a century ago, John Cotton Dana, director of the Denver Public Library, introduced innovations in services (such as the country's first separate children's room) and aggressively promoted library use by newspaper staffs, club members, teachers, and the business community.<sup>3</sup> Several decades later in Baltimore, Kate Coplan, while serving as publicity assistant to Joseph L. Wheeler, director of the Enoch Pratt Free Library, installed library exhibits in the windows of vacant downtown store buildings. When Pratt built its new main library in 1933, it contained the thirteen massive department store style windows in which the library displays its wares; highlights noteworthy events, issues, and local organizations; and gains city-wide attention and support.<sup>4</sup> Among today's many innovative public libraries is the one in Plainedge, New York which uses direct mail to carry messages to groups with similar interests, such as senior citizens, single parents, and, in cooperation with the schools, to parents of gifted children.<sup>5</sup>

Early accounts of academic, school, and special library development contain less about the promotion and marketing of libraries than do reports on public libraries. Recent library publications, however, offer advice (and good examples) on the promotion of all types of libraries.

### **Survey Findings: Lack of Planning**

What is the state of library public relations in the mid-1980s? National library periodicals contain articles on library promotion. Library conferences offer a variety of programs on communications and public relations. A growing number of medium-sized public libraries, and a few pioneering academic libraries are adding to their staffs public relations positions. And mass-media coverage of libraries in the press, radio and television is growing.

Although these increases in library public relations activity appear encouraging, a 1983 national survey revealed that the foundation for

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this activity is generally shaky. To prepare for a speech on the evaluation of public relations at the 1983 American Library Association Conference, Frank W. Wylie made a sample survey of 100 randomly selected academic libraries and public libraries serving populations of 50,000 or more. (Wylie, a former president of the Public Relations Society of America, is director of public affairs at California State University in Los Angeles.) Wylie learned from the survey:

- Only 58 percent of the libraries have a public relations program.
- Of those with a public relations program, only 19 percent have a formal public relations plan, 30 percent do not include the promotion of the library usage as part of their program, and only 21 percent measure results against objectives.
- Less than one-third of the libraries with public relations programs include library-city relations and donor relations as part of this responsibility

Wylie found it “alarming” in this time of “economic scarcity and imperiled budgets that more library public relations programs do not give high priority to the twin tasks of fund raising and donor relations.” Wylie urged all libraries of every size immediately to develop a public relations program with a formal plan and specific objectives. “Public relations,” he said, “is no longer an optional activity for a library.”<sup>6</sup>

### **Prescription for Improvement**

If library administrators would study Wylie's findings of libraries' needs and follow his counsel, the number of libraries with well-planned, effective public relations programs could grow rapidly. This would require: administrators who understand public relations principles and identify feasible results, experienced public relations staff (full time or part time), and good service by all members of a library staff which is the basis for a good public relations program.

### **Trend #1: Increased Library Cooperation**

But even before library administrators have time to respond to Wylie's alarming findings, a trend spotter can find some encouraging signs. Most important of these is the recent growth in national library cooperative efforts. Both the American Library Association (ALA) and the Library of Congress (LC) have launched major projects which, with the active participation by librarians throughout the country, have helped increase public library use. These national agencies have also

gained the support (including major funding) from corporations and mass media including network television.

In 1982, the Public Relations Society of America (PRSA) gave one of its prestigious Silver Anvil awards to ALA for four major public information programs. They were: National Library Week; a "Call Your Library" publicity campaign to promote inquiries to libraries by phone; the first national library newspaper *Openers* (the purpose of which is to encourage borrowing); and a syndicated radio show "About Books and Writers" developed with National Public Radio to tie in with the "About Books" syndicated ALA book review column." Sharing credit for this success are the public relations office staff and membership committees of ALA and the staff of the Public Relations Board, the public relations firm from which ALA contracts for services.

During her 1981-82 term as ALA president, Elizabeth W. Stone chose public awareness of libraries as the theme. Among the year's accomplishments were: the issuing of a library postage stamp, the adoption of a logo to identify libraries, and the plans for the creation of a Business Council for Libraries. The council gained operating funds in 1983.

In 1984, National Library Week (NLW) began a new partner's campaign to involve selected national associations more aggressively in NLW's year-long public information campaigns.<sup>8</sup> ALA has collaborated with McDonald's, Polaroid and other corporations to plan promotion of library services using these firms' products. Participation by individual libraries in the campaigns is voluntary.<sup>9</sup>

The Library of Congress's Center for the Book is now in its fifth year of collaboration with CBS television on the "Read More About It" program. Well-known performers appear on the screen after television specials to recommend books on related topics and suggest that viewers borrow from their local libraries. The performers have included Christopher Reeve, Cicely Tyson and Mikhail Baryshnikov. A new LC program, "And Now...Read About It," will encourage museums to incorporate reading lists into exhibitions.<sup>10</sup>

Another encouraging trend is the emphasis on public relations in the Special Libraries Association (SLA). In 1983, Special Library Association's members ranked public relations second among the six priorities the board of directors had adopted.<sup>11</sup> SLA gave staff support to this function by creating the new position of public relations officer and appointing Martha Johnson to fill it. SLA used its seventy-fifth anniversary year (culminating in June 1984) as the national focus for communication about the association and the field of special librarianship.

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Activities included production of a ten-minute videotape to show the resources and services libraries and information centers offer.<sup>12</sup>

Regional and statewide cooperative promotional programs could effectively reinforce these national programs and focus on regional services and needs. Such programs are still not universal. Among the notable exceptions, however, is the Council for Florida Libraries. In that state, librarians and citizens work together to produce materials and activities for use by public libraries. The council itself also promotes libraries statewide. Media used to communicate library messages include: pamphlets, buttons, stickers, posters, newspaper articles, radio and television public service announcements, and billboards. An early Florida campaign adopted the National Library Week "get your facts straight" theme and conducted a statewide campaign with a federal Library Services and Construction Act grant.<sup>13</sup>

In Pennsylvania, the state library has sponsored effective campaigns to promote public libraries. The 1982 campaign using the slogan, "We have the answers," co-opted the support of other state agencies and corporations.<sup>14</sup> In a third state, North Carolina, almost every public library sponsors a summer reading program using one theme statewide ("Just Open a Book" in 1982) and materials the state library supplies.<sup>15</sup>

In other regions and states, libraries work together on successful promotional campaigns. In 1982-83, encouraging actions were the creation by three state libraries of new public relations officer positions.<sup>16</sup> Generally, however, the potential for state and regional public relations cooperation is still unrealized.

### **Trend #2: Libraries Add Staff Specialists**

In addition to cooperative public relations programs, a second promising trend has been the recruitment of specialists in public relations and related fields for library staffs. One response to the economic recession of the late 1970s was an emphasis on fund raising by many libraries. In 1978, the Brooklyn Public Library created the position of director of development and public information and appointed Irene Moran to fill it. Moran, who had directed public relations at the Brooklyn Public Library and another major library, gained expertise as a fund raiser through attending seminars and workshops. Since then, the library has had noteworthy success in raising funds on many levels. (The library already had a national reputation for its public relations program.) "Buy a Book for Brooklyn," patterned after charity appeals, used direct-mail appeals to Brooklyn residents, and even coin canisters

in libraries to collect contributions. The library also solicited corporate and foundation support.<sup>17</sup>

The Branch Libraries of The New York Public Library gain vocal political backing from citizens for increased financial support from city and state governments. Professional fund raisers on the library's staff work with volunteers to raise money for the privately supported Research Libraries through glamorous special events and other activities. In 1983, the library netted \$217,000 when 95 prominent New Yorkers were hosts and hostesses at \$150-a-person dinner parties, most held in homes. (The event yielded publicity as well as money; ten *New York Times* reporters covered the dinners.)<sup>18</sup>

Academic libraries have traditionally relied on college and university fund raising departments to secure gifts for libraries from alumni and friends, and from foundations and corporations. A 1983 study by the Systems and Procedures Exchange Center at the Association of Research Libraries revealed, however, that academic libraries are increasing their role in fund raising. At least four of the 95 libraries had created a new position of fund raiser the year before.<sup>19</sup> The Stanford University Library is one of the academic libraries with a full-time library development officer.<sup>20</sup>

Few special libraries, with the exception of some in the federal government, are large enough for full-time public relations. Recently, the Smithsonian Institution Libraries created the position of assistant to the director for resource development. Initial responsibilities for Mary R. Rosenfeld, who was appointed to the new position, were the supplying of public information to staff and scholars (the two main groups of library users) and the development of fund raising strategies. The most successful of the new activities is the regular schedule of lectures and seminars for the library staff and the academic community. The office is also helping plan a campaign to raise funds for a library building.<sup>21</sup>

### **Trend #3: Adoption of Marketing Practices**

In addition to the growth in cooperative public relations and the addition of specialists to library staffs, a third promising trend in library promotion is emerging. This is the intelligent use by a few libraries of the practices and techniques of marketing. (Unfortunately, some librarians without an understanding either of the principles and practices of public relations or those of marketing use the two terms interchangeably to mean any type of promotion.) Philip Kotler, a leading marketing

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theoretician, teacher and writer, defines marketing as: "the effective management by an organization of its exchange relations with its various markets and publics." The best known classification for the variables in this process are the "four Ps": product, price, place, and promotion.<sup>22</sup>

The Baltimore County (Maryland) Public Library has been a leader in the use of some of the marketing practices Kotler describes. Among them are: market analysis; purchase of quantities of materials to meet current demands; placement of library units in areas of high traffic, such as shopping centers; and book displays in the style of retail stores.<sup>23</sup> Que Bronson, a branch librarian at the Anne Arundel County (Maryland) Public Library, has analyzed successful commercial retail methods of display and adapted these practices for libraries.<sup>24</sup>

The Denver Public Library, which has had a well-staffed public relations operation for decades, recently incorporated marketing into its administration. Over the past few years, the library has coped with the national economic recession which has weakened the resources and services of most large urban public libraries. The Denver library also suffered from inadequate financial support for the services it provided to suburban residents whose taxes (local or state) did not contribute to the library. In 1983, the library began the introduction of a marketing program recommended by a staff task force which had worked on the project for a year. The task force recommended that the library: seek more public and private financial resources; develop products and services for specific market segment needs; organize and staff a marketing operation in the library; and develop a communications program. As director of marketing, the library recruited Suzanne Landrum whose previous experience included marketing for a national brewery, raising funds from corporations for public broadcasting, and development work for a college. The responsibilities of the new marketing office encompass public relations, internal communication, market research, and development.<sup>25</sup>

#### **Trend #4: Use of Consultants and Outside Firms**

Finally, a fourth trend in library public relations and marketing is the increase in the use of specialists for free lance or consultant work. ALA's public relations section provided libraries with one way to tap this resource by producing a directory of library public relations workshop consultants. The listing of twenty-nine persons includes library staff who take on assignments in addition to their full-time positions

and a few self-employed public relations specialists. In addition to planning and directing workshops, many also can supply public relations services.<sup>26</sup>

A related trend is the increasing use by libraries of firms to conduct bond issue election campaigns and to direct fund-raising campaigns for capital improvement. A branch office of the Ketchum Communications Company, a national public relations and advertising firm, conducted a successful fund raising campaign for the Jacksonville (Texas) Public Library.<sup>27</sup> Ketchum's Philadelphia office donated advertising staff time and paid all expenses for a Friends of the Library campaign to recover long overdue library books. The campaign, using an imaginary character named Morton who was chained to his overdue books, resulted in recovery by the library of 160,000 books.<sup>28</sup>

### **Career Opportunities within Libraries**

Changes in the operations and staffing for the library public relations function offer career opportunities. Candidates for these new positions may be persons now employed in libraries, library school students with previous experience in these fields, or public relations and marketing specialists employed in fields other than libraries. Opportunities also exist for library staff for whom public relations or marketing is not a primary specialty. Most library public relations activities require the collaboration of many persons. Among the activities a library staff member might help with are: gathering information to assess opinions and attitudes; helping to plan and produce printed guides, promotional pieces, displays, exhibits, and audiovisual media such as slide/sound shows; and working on programs and special events.

A library staff member who wants to gain expertise in public relations would be wise to seek advice from library administrators to identify skills needed by the library. Then, the prospective public relations officer should gain knowledge and experience in these areas through reading, participating in seminars and workshops, and volunteering for related work in community organizations. A good source of information for self-education is the annual bibliography of books and journals the Public Relations Society of America publishes.<sup>29</sup> PRSA also cosponsors seminars and workshops for nonmembers in some major cities. Publicity clubs and universities with library schools or public relations departments are other sources of education.

Before making a major investment in time and money, however, the potential public relations staff member should analyze his or her

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abilities and potential for the field. Among the requirements for success in public relations and marketing are: the ability to gather facts, plan, and organize; an understanding of individual motivation and the political process (whether within a small department or in the workings of a city); excellent communication skills; and energy.

A library degree is not a requirement for carrying out effective library public relations work. Some libraries may, however, establish double job qualifications by requiring the chief public relations officer to have a library degree. In other cases the library degree may not be a stated requirement but administrators and library boards may give preference to candidates with these degrees.

To gain expertise in the field of fund raising from individuals and corporations and in seeking grants from foundations or governments, the library staff member can tap a variety of sources. Among them are: the Foundation Center and its regional library collections; the Grantsmanship Center which sponsors training workshops and publishes printed guides; books and periodicals on fund raising and grant writing; and workshops and seminars sponsored by academic institutions and associations.<sup>30</sup>

The library staff member who possesses or acquires public relations skills increases his or her value as an employee. New opportunities—especially for the person who is able to move to a new community—will undoubtedly continue to increase. Examples of some recent career opportunities can be a useful guide. While working in an accounting firm's library, Anne A. Heanue gained public relations skills and was chosen for a position in ALA's Washington office where she is now assistant director. The Louisiana State Library recruited experienced radio and television producer Sue Fontaine as its public relations officer. She later was public relations director first for the Tulsa City and County Public Library and then for the Washington State Library. She now holds that position for The Branch Libraries of The New York Public Library.<sup>31</sup>

### **Career Opportunities Outside Libraries**

Public relations training and experience also can be a springboard from library positions to those outside the field. Penny Yost went from a public relations position in a Texas library cooperative to a position with the Dallas Convention Center. Diana Stotler was assistant public relations officer at the Ferguson Library, the public library in Stamford, Connecticut, when Colt Industries hired her as manager of corporate communications.<sup>32</sup> After directing the graphics department for the West



Virginia State Library, Carole Bryan opened her own graphics firm. Part of her firm's work is for libraries, and Bryan produces for a national library audience a graphics and public relations monthly newsletter entitled *The Library Imagination Paper* (see appendix with this and other related resources).

### Lifelong Opportunities

The field of library public relations offers an additional benefit beyond increased job opportunities within libraries and in other organizations. For the person who wants to continue work after retirement, it offers skills which can be put to a variety of stimulating uses. In 1956, Louisa Ward Arps, a librarian and writer, helped create and appeared on a thirteen-week television series on local history sponsored by the Denver Public Library. The series launched the city's new public television station. Arps later expanded the material from the series into a book, *Denver in Slices*.<sup>33</sup> In 1983, the out-of-print book was reissued in both print and in a new taped edition for the blind and physically handicapped. Meanwhile, Arps has retired from her library position, but she still researches and writes Colorado history.<sup>34</sup>

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30. The Foundation Center, 888 Seventh Ave., New York, N.Y. 10019; and The Grantsmanship Center, 1031 S. Grand Ave., Los Angeles, Calif. 90015.

31. Sue Fontaine to Alice Norton, personal communication, 16 Dec. 1983.

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33. Arps, Louisa Ward. *Denver in Slices*. Denver, Colo.: Sage Books, published by Allan Swallow, 1959; Athens, Ohio: Ohio University Press, 1983.

(The author, then public relations officer for the Denver Public Library, worked with Louisa W. Arps on the production of the series.)

34. Louisa W. Arps to Alice Norton, personal correspondence, Jan. 1984.

## Appendix

### PUBLIC RELATIONS RESOURCES

Titles of many books and articles are included in the Reference section of this article. Some additional library public relations resources are included below.

#### *Example of article on public relations for special libraries:*

Pertell, Grace M. "Selling the Business Library." *Special Libraries* 72(Oct. 1981):328-37.

#### *Example of public relations for academic libraries:*

Edinger, Joyce A. "Marketing Library Services: Strategy for Survival." *College & Research Libraries* 41(July 1980):328-32.

Rummel, Kathleen Kelly, and Perica, Esther. *Persuasive Public Relations for Libraries*. Chicago: ALA, 1983, 199p (twenty-two practical articles on effective library public relations and marketing by library staff, library school faculty, and library consultants, all specialists in the field; with bibliography).

Among the general national library periodicals that regularly carry news items and articles on library public relations in all types of libraries are:

*American Libraries*, *Library Journal*, *School Library Journal*, and *Wilson Library Bulletin*.

Two newsletters that contain only articles on library public relations and promotion and have public and school libraries as their primary audiences are: "The Library Imagination Paper!" published quarterly by Carol Bryan Imagines, 1000 Byus Drive, Charleston, West Virginia 25311.100

"LIPP: Library Insights, Promotion & Programs," published about nine times a year by Deja Vu, P.O. Box 431, La Grange, Ill. 60525.

*Library PR News* published bimonthly by Library Educational Institute, Inc., R.D. 1, Box 219, New Albany, Pa. 18833.

# Forensic Engineering Information Services

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ALINE M. FAIRBANKS

THE AUTHOR WRITES FROM the perspective of an engineering reference librarian for Triodyne Inc. Consulting Engineers, a firm specializing in forensic engineering and safety research. The style of reference service offered typifies trends in many special libraries, but the employer operates in a nontraditional segment of the industry—engineering consulting. Forensic engineering is the application of accepted engineering practices and principles for discussion, debate or for legal purposes.<sup>1</sup> This discipline has grown apace with the products liability litigation movement of the past two decades. Information services in forensic engineering have rigorous and well-recognized requirements, including, for example, state-of-the-art documentation. An attempt will be made in this paper to summarize the historical development of product liability laws, to specify problems in searching the scientific and technical literature for information to be used in product liability lawsuits, and to review the activities of Triodyne Inc.

## Product Liability Litigation

Since the early 1960s, there has been an astonishing increase each year in the number of product liability lawsuits. Twenty-five years ago, there were less than 5000 a year<sup>2</sup>; today, the current level is more than 1 million. In Cook County (Illinois) alone, total judgments increased from less than \$4 million between 1960 and 1964 to \$33 million from 1975 to 1979.<sup>3</sup>

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Some would say that if a product can be manipulated, operated or played with; ridden, driven, climbed on, walked on or slid on; slept on, in or with; eaten, administered, prescribed or worn, it is subject to defect and, therefore, subject to a product liability lawsuit. Others would say that is not such an exaggeration; rather, it is perilously close to truth.

Why this dramatic rise in number of liability suits which some might call epidemic? The answer to this lies in the evolution and development of liability laws and legislation predicated on the interplay of many different disciplines and activities. These include design engineering, manufacturing, processing, quality control, marketing, legal and judicial principles, insurance laws and practices, and, of course, increased safety awareness and heightened expectations of consumers.

What is product liability? It has different meanings depending on the context in which it is used. In legal terms, product liability describes an action, such as a lawsuit, in which an injured party (the plaintiff) seeks to recover damages for personal injury or loss of property from a seller, a manufacturer, or an insurance company (the defendants) when it is alleged that the injury or loss resulted from a defective product. From a technical viewpoint, product liability is thought of as the responsibility of a manufacturer for the proper, safe, and reliable performance of his product. When manufacturers produce goods with safeguards against predictable defects, deficiencies, abuse, or misuse, product liability should be minimized. On the other hand, and even in the best of worlds and times, consumers will abuse or misuse a product despite all cautionary measures, and products do break down, resulting in an increase in the number of product liability suits.<sup>4</sup>

### **Legal Traditions Relating to Product Liability**

To bring the picture into focus, we need to trace the history of manufacturer's product liability, a history reflecting the changing attitudes of the market. The concept probably extends as far back in ages past when the first clansman fashioned a pointed stick for a fellow clansman to use for spearing fish in the local stream. The fisherman found the stick to be defective when it broke on the second attempt to spear a fish, thus depriving the clan of its next meal. It is doubtful that any legal battle was fought over the problem; however, at the next gathering of the clan, the group may have had to wrestle with the issue of whether a defective spear made from wood of questionable quality, resulting in the loss of a meal, was of such consequence as to require banishment from the clan of the poor fellow who made it.

In the Middle Ages in England, probably the oldest and best known rule of the marketplace was expressed by the Latin maxim "caveat emptor" or "let the buyer beware." In those days, the bootmaker or harness maker dealt face-to-face with customers living within a day's walk of his place of business and who also were part of the local scene on market day, in church or at festival time.<sup>5</sup>

With the advent of the Industrial Revolution, more and varied products were produced in factories in one area, for sale in yet another area. New industries were born; changing methods of manufacturing called for new marketing techniques. Increased production of goods resulted in a corresponding increase in consumption. All these factors necessarily complicated the issue regarding the responsibility of the manufacturer for his product and the responsibility of the retailer or seller for goods sold in the marketplace.

At that time, two points of product liability were recognized: (1) the relationship between the parties entering a contract, or "privity of contract," and (2) common-law decisions based on negligence.<sup>6</sup> This was known as the English common law which formed the basis of the law administered in the United States. This law held that a manufacturer was liable in damages only if he was proved negligent in the manufacture of his product. And only those who had contracted directly with the manufacturer in the purchase of the product could qualify as the plaintiff. This was known as "privity of contract" and meant that Consumer *A* could not sue Manufacturer *C* for damages unless the consumer had dealt directly with the manufacturer and not with Retailer *B*.<sup>7</sup>

This is best illustrated by the famous case of *Winterbottom v. Wright*.<sup>8</sup> Here the Postmaster General of England had purchased a coach which overturned on one of its appointed rounds, injuring the driver, Mr. Winterbottom. It was found that the coach had a defective wheel. There being no privity of contract between Mr. Winterbottom and the manufacturer (Wright), the case was dismissed. The rule of privity of contract remained in effect with few exceptions until 1916.

In that year, *MacPherson v. Buick Motor Company*, a landmark case, was tried in the United States.<sup>9</sup> Again, a defective wheel caused the collapse of the automobile, injuring the driver and passengers. None of these people had a contractual relationship with the Buick Motor Company. The judge ruled, however, that if a product when defective was capable of causing injury, it was an inherently dangerous product. This ruling had the effect of completely eliminating privity of contract as an element of proof in a negligence case, thus expanding the class of

those protected to include virtually anyone injured by the product, whether a direct user or not.<sup>10</sup>

This resulted in a major shift away from the traditional concept of common-law liability for manufacturer's negligence to one of holding the manufacturer liable in negligence to an ultimate third party, the consumer, even without privity of contract. The doctrine of "caveat emptor" which had stood substantially unchanged for hundreds of years now gave way to "caveat venditor" or "let the seller beware."

### **Consumers and Product Liability**

Over time, court decisions were built upon this idea of multiple liability: the manufacturer of the product, the component manufacturer, and the final assembler as well. On the flip side, the protected group was expanded to include virtually anyone injured by a product, even if the injured party was not a direct user; e.g., an unfortunate bystander.

From that jumping-off point, the pendulum began to swing strongly in favor of the consumer, with the courts favoring more and more strict liability. The burden of defense shifted from the plaintiff, or injured party, to the manufacturer, the defendant. Before this shift, the plaintiff had only to prove negligence on the part of the manufacturer to collect and to prove that the product was not manufactured according to accepted standards; and that its design was defective or not in line with industry practice. If, for example, a machine had a number of sharp, whirling blades, it was assumed that a reasonably prudent person would not reach into those blades. Anyone who did was not likely to collect in a lawsuit.<sup>11</sup>

Under strict liability, the plaintiff need only prove that the product was unreasonably dangerous or defective, that the defect existed when the product left the control of the manufacturer, and that harm or damage was caused by the defect.

Manufacturers now had to second guess not only how the consumer would use his product, but even how he might misuse it. For example, a woman collected a large settlement from an oven manufacturer when she used an open oven door as a step stool while changing a light bulb. The door hinge broke, the woman fell and was injured, and the court ruled that the manufacturer should have foreseen this use.<sup>12</sup>

Public attitude toward product quality and reliability began to change. Mass production tended to reduce price, increase quantity and, frequently, affect quality. Feelings of dissatisfaction by the consumer

were picked up by public crusaders and politicians. City, state and the federal government were pressured to enact laws to protect the "helpless" consumer. Publicity was given to large product liability suit settlements, and crusaders such as Ralph Nader attracted a following.<sup>13</sup>

The manufacturer, and those involved in the chain of merchandising, quickly came to be perceived as the uncaring bad guys accused of developing products of poor design and shoddy workmanship and products lacking in quality control. Further the manufacturer was perceived as best able to pay for damages, the one with the deepest pocket whatever the loss. After all, there is no point suing someone with only twenty-five cents in his pocket.

The uproar eventually caused the creation of a National Commission on Product Safety, followed by the Consumer Product Safety Act of 1972. By the 1960s, the times were right for a surge to begin in the number of product liability suits: heightened public awareness to the changing laws favoring the plaintiff's side, publicity given to settlements in five and six figures, and a plethora of attorneys eager to acquire the fruits of litigation. By accepting clients on a contingency basis, attorneys could collect 30-40 percent of all awards made—quite a tidy sum considering some of the multimillion-dollar settlements made in recent years.

### **Expert Testimony and Product Liability**

As lawsuits proliferated, experts whose testimony could make or break a case in court emerged as a major part of the American litigation scene. Because of the mechanical complexities of products and processes, the chemistry of substances and materials, the geometry of ricocheting particles, some technical point is usually a key issue in a product liability suit. Doctors, engineers, economists, firearms and explosives experts, as well as persons specializing in street-gang subculture, food sensory evaluation, tree failures, bite-mark identification, animal and human psychology, and in forensic engineering were sought after to supply expert testimony.

The *Federal Rules of Evidence*, Rule 702, states that: "If scientific, technical or other specialized knowledge will assist (the courts) to understand the evidence or to determine a fact in issue,...an expert by knowledge, skill, experience, training, or education may testify...in the form of an opinion or otherwise."<sup>14</sup> Believability is primary to the case. An outside expert is more apt to be seen by judge and jury as having no bias to the case.



In the course of a trial, the expert may be asked to determine how a product failed and why. This requires an analytical evaluation of the product and may also require laboratory testing (e.g., failure of a jam nut to hold at high altitude). He may be called on to determine if a product was designed and manufactured according to accepted industry standards (e.g., should the product have been welded rather than bolted). He may be used for his knowledge of equipment and repair costs. He may be asked to reconstruct the probable events of an accident and their significance in the absence of witnesses, or when all equipment and products involved were destroyed (e.g., explosions, fires, vehicle accidents). Expert opinions of risk call for knowledge of both design and industry practice. For example, did the design and placement of a motorcycle kickstand contribute to an accident when the kickstand failed to retract upon contact with the ground while traveling at 45 mph and rounding a curve? The expert must be able to analyze the product or event to determine if some element in any way helped create a potentially dangerous situation or was directly related to a failure.

The expert may have only a bit part to play in the courtroom drama or he may have the starring role in the outcome of a multimillion-dollar lawsuit. His testimony will be based not only on his own professional knowledge and personal skill, but also will have been supported by the work of his staff of engineers, graphic artists, model builders, laboratory technicians, and librarians.

This support may take the form, for example, of field reports of the accident site; two-dimensional drawings of two-hand controls for machine tools; a scale model of a truck cab demonstrating positions of side- and rear-view mirrors and their field of view; a scale model of a vehicle accident site showing position of guard rails, bridge abutments, shoulders, ditches, etc. in relation to the roadway, and the probable trajectory of the vehicle as it left the highway; laboratory test results of impact strength of material; and documentation showing which, if any, industry or federal standards were in effect at the time the product was manufactured.

It was the increasing need for just such assistance and professional skills that gave birth to Triodyne Inc. Consulting Engineers.

### **Gathering the Evidence—Forensic Engineering**

Triodyne Inc. is a firm which specializes in forensic engineering and the safety of engineering systems and mechanical devices. Founded in 1969 by two mechanical engineering professors, the firm now oper-

ates in three locations with corporate offices and laboratories for model building, photography and vehicle analysis. Its clients are trial lawyers, manufacturers, injured parties, insurance companies, and others who need technical assistance in trial preparation and in expert testimony. These activities may be grouped under the rubric of forensic engineering, a relatively new and multidisciplinary profession in which technology interfaces with the law. In addition to its work in forensic engineering, Triodyne is retained by insurance companies and manufacturers to conduct research and development in other areas of engineering; however, the information services for such areas are not as dependent on library research as is in the area of forensic engineering.

The staff is composed of engineers, scientists, graphic artists, librarians, and technicians engaged in product safety review, accident reconstruction, design analysis, fire investigation, model building, mechanical systems and components evaluation, performance testing, the reduction of information to graphic form, and literature research and state-of-the-art documentation.

Briefly, here is what happens in a typical product liability case handled by Triodyne staff. After an accident occurs and a client/attorney retains Triodyne to work on behalf of either a plaintiff or a defendant, a project engineer is assigned to supervise the firm's effort for that client. The significant aspects of the case and the allegations made by the opposing side are outlined by the client. This is a critical time in the development of the case, for it is here that the details of the accident must be spelled out in order for the engineer to develop a strategy for investigating the case.

The first step in the investigation is an inspection of the accident site and the product or machinery (called an artifact) allegedly involved in the accident. Photographs are taken of every possible angle or operation and of every component part of the artifact that might have bearing on the case. Inspection notes and photographs are converted into a field report which becomes part of the official record of the firm's involvement in the case. At this point a literature search may be requested.

The type and amount of literature required for a case may vary, but generally the following are needed: standards and codes in force at the time the artifact was manufactured, literature which documents industry practices prevailing at the time of manufacture, reports on modifications in the artifact or manufacturing process from the date of manufacture to the date of the accident, manufacturers' catalogs and operating manuals illustrating or defining comparable products on the market at the time of manufacture, reports of safety problems encoun-

tered in the use of the product or comparable products, and accident statistics for the product or process in question.<sup>15</sup>

### **Role of the Information Center**

The purpose of Triodyne's Information Center is to fill these needs. Its collection is similar to that of other engineering or special libraries in that it includes books, journals, indexes in technology, standards, manufacturers' catalogs, automotive service and operating manuals, technical reports, pamphlets, and blueprints. Triodyne's dissimilarity occurs in the quantity of retrospective material held and continually sought in order to access the state-of-the-art for any durable product manufactured anywhere from ten to fifty years ago. Where most libraries tend to discard superseded titles with some regularity, the information center's staff combs the "give-away lists" and badgers colleagues to "throw it our way." Their junk becomes our gold.

Early editions, for example, from the 1940s and 1950s of the National Safety Council's *Accident Prevention Manual for Industrial Operations* are highly prized, as are handbooks of the Society of Automotive Engineers (SAE) and issues dating from the 1920s of *Agricultural Engineering* of the American Society of Agricultural Engineers (ASAE). These titles give details of the technology of industrial operations of their day, and they list standards and recommend practices for automotive equipment and farm machinery of the past.

Recently, we were asked to document the historical development of agricultural tractor power-take-off (pto) shafts, their drivelines, and the guarding or shielding of these moving parts. A farmer became entangled in the pto-driveline of his tractor and brought suit against a tractor manufacturer. The tractor in question dated from the 1940s and had been modified over the years to accommodate more sophisticated tractor-drawn and tractor-powered implements. In order to document the progressive changes and improvements made by the industry on pto's and component connections, the information center searched its retrospective holdings of standards and recommended practices, made numerous telephone calls and wrote to standards-writing organizations, and traveled frequently to the John Crerar Library to pore through its rich holdings of retrospective standards from ASAE and SAE.

The earliest standard for pto's dated from 1917, with revisions beginning in the 1920s and continuing into the 1980s. Since the advent of pto's influenced development of additional components on tractors and tractor-drawn implements, succeeding standards and recom-

mended practices were written. And then the fun began! Terminology was neither standardized nor well defined in the 1920s—Who had time for that?—as mechanized farming was still in its infancy. Titles of standards changed to include broader applications for pto's, then later changed again as tractor power stabilized at 540 rpm and 1000 rpm, with further title and content changes being made as the safe operation of farm machinery became more of an issue in the industry. The genealogical record of the ancestry of the wives of Henry VIII and their progeny just might have been more complex; however, verifying that all pertinent standards with their revisions were at hand or on order, and designing a matrix to illustrate the scope and revisions of these standards was certainly more critical to Triodyne than who gets to be queen.

The literature-search process is greatly affected by the fact that information is often needed quickly, with results preferred yesterday. Trials are not postponed in deference to information or document-retrieval problems. As trial testimony progresses and issues surface which could not have been anticipated, the expert may telephone the information center during court recess for information he suspects exists and is needed.

Recently, a call came in where the courtroom expert wanted to know whether mechanical engineers were involved in the development of city building codes—codes thought to be in the purview only of civil engineers. While the expert waited on the line, a librarian verified in the building codes of a major city that mechanical engineers were indeed utilized in the writing of that city's codes. As a result, the case settled immediately after recess.

It is the practice of the information center to develop a bibliography of pertinent documents for each case and to record and file these documents by case name as well as by subject (e.g., cranes, hedge trimmers, jon boats, log splitters, hot-air balloons, magnetic switches, gym mats, autoclaves, etc.) or by issue (e.g., guarding by location, visual depth-perception, stairway lighting, force required to cause injury to the human eye, hand-grip reflex action, head room in trucks, physical properties of soils, safety requirements for purging tanks before welding, speed of running man, etc.).

As similar cases are worked on, recourse to previously gathered documentation becomes a blessed time-saver even should there be slight variations in the issue from one case to another. In many instances, bound volumes of previously gathered documents with their accompanying bibliographies are prepared, recorded and filed for quick retrieval should such material be needed again on similar cases. Some searches

are never ending. We are still looking for literature discussing the motor vehicle's "firewall," now breached in several places to accommodate instrument-panel connections to engine components.

Terminology is an ever-present problem, as is true with any profession having its own peculiar jargon and technical terms. A library can hold the world's total of dictionaries—mono-, bi-, trilingual—and yet be left without a proper definition of, say, a *pintle hook* or *safety*. Further muddying of the waters is in the transfer of information from client to engineer to librarian. Some mistakes are only amusing, while others are of such seriousness as to send the expert out to trial with an industry standard for a "manlift" when what he really needed was the standard for "elevating and rotating work platforms." These are two quite different devices. The first, *manlift*, is used in parking garages, for example, to lift a car jockey quickly to an upper level to retrieve a car, while the second device, *an elevating and rotating work platform*, is usually a truck-mounted, articulating boom lift with a basket from which a tree trimmer or a utility company employee can operate at above-ground levels.

Malapropisms creep into the information exchange to add levity to an otherwise intense, often frantic work schedule. A new member of the library staff took a telephone request for information on "anti-tube-locking devices for trains." Well, let's see: "anti-" meaning against or hostile to, "tube" as in toothpaste?, "locking" as in the act of securing something, and "trains"...no problem. The staff wizard, who has yet to forget a case name or issue involved, puzzled over why anyone was spending time on a toothpaste tube search and revealed that the multi-word term was in reality "anti-two-blocking devices on cranes."

To support the very specialized nature of the company's interest, the relation to its information requirements, and the time frame in which information must be retrieved, access via computer terminals to OCLC, DIALOG and SDC is available. Although these databases are essential to our operation, they have not proved as successful as was anticipated, largely because of our need to zero-in on unindexed minutia, and also because the vintage of some artifacts is such as to preclude their inclusion in machine-readable databases; e.g., World War II steel, a 1925 drilling machine, or a 1938 furnace.

Further the multidisciplinary nature of the literature in safety and forensic engineering requires searching across a broad band of print and nonprint sources. A case in point is with the literature in human factors engineering, or ergonomics—a field of study which emerged as a distinct discipline following World War II. It is a fruit basket of interacting

disciplines in the behavioral and biological sciences, mathematics, statistics, and anthropology; and with the professions of design engineering and architecture.<sup>16</sup> It is the study and process of designing products we use, how they are used or misused, and the environment in which we work. Its literature is yet to be sufficiently indexed to enable an online search to come up with, for example, the torque strength of the hand of a six-year-old Caucasian boy, or the reach distance of a supine fiftieth-percentile forty-year-old woman.

## **Conclusion**

The thrust of the company's interests, the uniqueness of the subject matter, and the scope of the information-retrieval process are legion and vastly interesting. We cannot underestimate the value of cooperative arrangements with such systems and networks as the North Suburban (Illinois) Library System and ILLINET, whose services extend our library's holdings. Nor can we praise loudly enough our colleagues in libraries all over the country whose help via an "underground railroad" system of assistance from one possible source for information to another is valued second only to our holding the published document on the needed subject at the moment. In interacting with engineers and in searching the literature, it helps to have some sense of mechanics and be able to visualize how things work or do not work. A bachelor's degree in general engineering would, perhaps, have been more useful than one in music; however, this writer had no trouble driving the tractor-drawn corn picker from one end of the parking lot to the other!

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# Employment in the Online Industry: Personal Reflections on a Nontraditional Library Career

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LINDA PANOVICH-SACHS

I WOULD LIKE TO DISCUSS the philosophical connections between traditional librarianship and the nontraditional online profession and then set out similar and different skills in the two professions. As an added and important facet to this discussion of skills, I will discuss the for-profit nature of the majority of online companies and how this fact distinguishes working for a database producer or database vendor from working for a special library in a for-profit corporation. I will include a few pros and cons of working in the online industry as a brief evaluation. Agreement or disagreement with these pros and cons also depends on what company or what institution one is working for in all library/information fields. In each case personalities and management abilities can make a job lovely or miserable in either world.

Lastly, a general list of typical activities of an online-industry marketing professional is included to help librarians and other information specialists see the activities that they may not realize they are already doing in their libraries. Alternatively, scheduling and promotional activities that I took for granted as normal because this was my first library/information job, will also be viewed; activities I now know to be outside most normal library functions. My hope is that new librarians and those looking for a change can reflect on my observations and get a clearer picture of how they might fit into this different but related information world.

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## **Background**

After graduating from Simmons College Graduate School of Library and Information Science in 1981, I took a nontraditional position as Marketing Coordinator of HARFAX Database Publishing, producer of HARFAX Industry Data Sources database and "electronic" subsidiary of Harper and Row, Inc. I must say that I am no longer working for HARFAX because of a family move and not because of any dislike of the industry or the company. I found database publishing work to be exciting and rewarding. Although my information experience cannot be totally separated from my marketing position at HARFAX, my observations on this new and developing industry are by necessity and utility industry-broad. There are more jobs at HARFAX than just the one I had, and there are scores of database producers and database vendors with various chains of command and distributions of skill. Therefore, I think it will be more useful to librarians to reflect on my knowledge of the entire industry.

As Marketing Coordinator, I traveled frequently to conferences, presentations and training sessions, and often met with representatives from many databases, and these contacts provide a basis for my opinions. Thus, this discussion will be bigger than my experience at HARFAX. It will not be, however, a scientific survey of professional positions and hierarchies within the online- or electronic-publishing industry; that comprehensive survey must be left to another day, and would by nature be limited, as much of that information is proprietary. In the same vein, I am not an expert; I worked in one position for one company for a short time. And yet, even with all these caveats, I feel my observations will serve some use, as I have done much personal reflection on all these professional issues. Opportunities for online professional positions will be growing for people who have certain interests and qualities, and there is a great deal of conceptual connection between library science and the online profession.

## **Philosophical Connections**

Access to information is the basis of my concept of librarianship. Learning systematic ways of providing access was rooted in my reason for going to library school, and this interest grew into my choice of going into a nontraditional online professional position. I decided to go to library school after reflecting on my previous jobs as a teacher/curriculum designer and secretary and concluding I needed a change. Common skills and abilities in these two occupations and in library and

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information jobs include: (1) being a liaison or intermediary; (2) helping to organize materials so others can use them; (3) having an interest in a variety of subjects; and (4) being capable of handling more than one project at a time. My skills and interests were supported at Simmons College, where I had an excellent preparatory course in online searching, as well as core courses in reference, organization of knowledge, and various electives.

Librarians are skilled intermediaries. Librarians can talk to a person and translate his or her needs into a prescription for information likely to be found in a directory, handbook or report. This translating skill may be most important in science/technical reference positions, as scientists work in a focused research world and need to sort through mountains of published information possibly relevant to their work. Scientists often cannot effectively sift through all the paper because they lack the time. Using divergent thinking, the librarian sifts through publications and assists in bringing relevant, related materials together for the scientist's use. It is just this liaison relationship and sifting function that a good online database performs. A well-organized database which is carefully indexed and edited, assists the information scientist in using it as a reference tool just as using organization and indexing skills in regular print reference tools assists the information scientist in sifting through published material. Reference tools, paper-based or machine readable, classify the published material and help to limit the total number of publications the librarian must see. The librarian chooses among reference tools, further winnowing the pile of published material, to lead the scientist (or other end-user) to relevant reports, articles, proceedings, etc. In this way the levels of winnowing descend demonstrating the connection between the library and database worlds—the reference tool sifting the publications, the librarian/information specialist sifting the reference tools, and the scientist making the final relevance decision among a smaller, more manageable number of publications.

### **Skill Similarities and Differences**

For those who wish to see the connection to day-to-day jobs in the online industry, I will explain some similar and different skills between the two professions. The skills necessary will vary from online job to online job, as well as from one database producer to another. At HAR-FAX, the Marketing Coordinator is in charge of sales promotion and training. There are other less visible positions with managing, index-

ing, editing, and computerization responsibilities—all of which require a variety of information skills and interests and which contribute to the final database product. Therefore, prospective applicants for jobs in the online industry should consider their likes, abilities and goals; and then applicants should evaluate and compare their interests to the skills needed in various online industry jobs.

Skills needed in a promotional position in the online industry are often the same skills acquired in librarianship, but they often remain unlabeled, or worse, undiscussed. It may seem obvious to state that one needs a sales sense to promote a product—even an information product. Sales sense is the ability to understand why a client needs the product, how to find prospective clients, or how to demonstrate the product to the client. These motivational or sales skills closely parallel the ability to understand a library patron, to conduct a reference interview to discover what the patron really needs, and to explain to them the benefits and limitations of the facts or reference tool provided. When I was an online trainer, librarians became my patrons and clients. I sought to discover their information needs, how the database might best address their needs, and how to teach them to use the database product. I was interacting with them the way they would, in turn, interact with their own patrons.

Investigative reference skills are required of both librarians and online professionals. Librarians hesitating over a career change should remind themselves that when trying to find the answer to a reference question, the thorough, curious librarian searches his/her mind among reference tools. Each reference librarian looks for the tool with the right combination of topic and access point, and if that one doesn't do it, librarians search repeatedly for another reference tool that could have the answer. This common pattern of tracking down the answer by thinking through appropriate tools and access points is similar to the process an online promoter uses. Promoters are always thinking of other user groups and professional associations to speak to, additional appropriate periodicals in which to place advertisements, or other relevant conferences to attend to publicize the database. A marketing coordinator is gratified by discovering a new professional association in an important city, or from listing the product in the preprints or exhibiting the product at the conference. In the same way, the reference librarian is pleased when the question is answered by the tool. Thus, able investigators are satisfied in both professions.

The librarian tailors the collection to local topics or to research interests to reflect the needs of the patrons. In like manner, the online

promoter may strive to discover particular regional industrial interests. Further, promoters need to be aware of audience composition. For example, online trainers will augment their presentation if the audience contains both special librarians and academic librarians, because these librarians have different budgets, client demands, and document focuses. Academic librarians often are more interested in the reference works and periodical articles the database cites, while special librarians are more apt to be interested in hard-to-find market-research reports, journal special issues, and progress reports that are too esoteric and expensive for most academic libraries. This interest-tailoring skill is a strong part of librarianship as well as database promotion.

Another skill similarity is the need in both professions for people who can deal simultaneously with projects involving a great deal of detail work. Library work is very detail-oriented, and much of what a nonlibrarian might call a distracting range of activities, a librarian might call attractive and interesting. There is a comparable level of detail between database marketing positions and those of librarians. The librarian has multiple patrons and projects. The marketer has multiple conferences, presentations and exhibits to organize, which makes the library detail skill transferable to the online industry.

### **Factors to Consider in Choosing an Online-Industry Job**

While a sales/motivational skill, an investigative skill, a local-interest skill, and a skill with details have been mentioned as evidence of the similarities between librarianship and positions in the online industry, there are aspects of promotional jobs within the online industry that are quite different from jobs in libraries. Some of the differences are an exaggeration or extension of the similarities. Even so, the differences should not be minimized when looking at a nontraditional information career. The first difference is related to the sales skills mentioned previously. There is an additional training aspect of most marketing positions that is rarely part of library education or the library profession. Background in teaching and curriculum development helps here. A teacher or curriculum developer is prepared to break up facts into lesson plans, and can provide the triple reinforcement of overhead transparencies, oral presentation and an information packet with the text outline. Understanding what makes a clear presentation, recognizing limits in attention spans and knowing how to keep a group from disintegrating are complex processes. These are complicated by inevitable differences in skill level and interest in each audience. A marketing coordinator—

the database expert—has to understand the novice's needs for explanation in nonjargon terms. These requirements put the trainer on the spot, because if users don't understand the presentation, they might not use the database.

A second difference between librarianship and the online industry—particularly for jobs outside of promotion—is that even though both professions have many details to consider, the online professional has fewer public contacts than the traditional librarian. While working the public-contact position at HARFAX, I went for weeks without seeing people other than my coworkers. Although I spent a great deal of time on the telephone to conference coordinators and online user-group representatives, I did not have the high number of interruptions evident in academic, public or school libraries. A special librarian, who has fewer patron interruptions than other traditional library types, is closest in this context to the online professional. In turn, most of my work was paper oriented: memos, letters and notes to document phone conversations were just some of the records I had to keep. Therefore, if you prefer personal contact to paper-oriented service, you would prefer the traditional library setting.

Planning in the online industry represents the third difference from traditional library jobs. The ability to plan one to two years in advance, to set priorities, to budget, and to deal with multiple simultaneous projects involving different time requirements was very important in my position. It was critical for me to spend from one-quarter to one-third of my work time just choosing what order I would do things in. This may sound like a ridiculous simplification, or even for some like a waste of time. Yet it became paramount for me to be able to juggle my tasks; and so I took time to assess priorities and my work flow, even when there were many things sitting on my desk. I could not just do the items in sequence in my in-basket and have a clear day's work finished. Another aspect of coordinating multiple simultaneous events is that most of them were in the future, which is not the case in a library. By the time a conference happened, I had less to do with it. Three to four months later, I was planning for the next year's conference. Six months' advance notice before online user-group presentations became ordinary—if my calendar was crowded—and a requirement of one month's advance mailing of notices to group members of any proposed meeting was minimum. I always had one to two years of conference and online training schedules penciled on my calendar, often including as many as twenty events in various stages of preparation on any one day. Each had several due dates—e.g., for exhibit submission, registration

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payments, or product outlines for the proceedings. A related difference was that in order to do the main portion of my job, I did not need to be on-site, whereas most librarians must be. I could work in the office, at home, or on the road. My main tasks were managing my small department and planning my job time, but, I also needed to see the bigger picture of the marketing plan, along with keeping track of the details.

Time-management skills are seldom emphasized to this degree in most library positions. You can do your projects and leave, with most library jobs involving some simultaneous tasks and some short-term planning. The degree of scheduling and planning necessary is a big difference between librarian's and an online promoter's position. Nevertheless, many librarians use management skills such as planning, budgeting and setting priorities—especially those librarians in high-level positions. In my opinion, many librarians who haven't done much planning would get more done and feel more organized if they were willing to spend one-eighth to one-fourth of their work time in setting priorities and laying plans.

Careful use of time leads into the fourth and most interesting difference between most library positions and positions in the online industry—the for-profit nature of the online industry. Most database producers and vendors are for-profit companies. The major difference between nonprofit enterprises such as libraries (operating at minimum cost for maximum public service) and for-profit information companies is simple: for-profit companies want to make money and they believe you have to spend money to make money. A corollary to this statement is that time is money. As an online professional, particularly in the promotional area, you cannot be afraid to spend money and you cannot act as though a company's budget appropriations are your housekeeping money. A more specific example of the difference is that librarians in the nonprofit sector might take the least expensive route from the airport to the conference because they are either paying for the conference expenses themselves or they are trying not to diminish their library budgets. An online professional working for a for-profit corporation will probably take the *most convenient* method of transportation and accommodation. Sometimes this is the cheapest, and sometimes—but not always—it is the most expensive way. Executives and marketers in for-profit companies realized it is important for people who are going to sell a product or represent their company to be rested, relaxed and well-prepared. Staying in the conference hotel and paying porters to carry mountains of equipment and handouts will help sell the product, and by association, will help to make money. Going the cheaper route

may save a few pennies, but such travelers arrive at the conference tired and perhaps late. The promoter will not be as effective if he/she has to trek through traffic each day of the conference to and from the cheaper hotel.

Related to this attitude of spending money to make money is the frequency of company-paid travel involved in a promotional position. Some online promoters travel two weeks out of a month. I enjoyed my traveling, but I only needed to travel about one week every other month. You must be aware of travel requirements, even for some of the nonpromotional employees. Going to a national conference can give you a stimulating view of broad professional issues. However, fear of flying or having many home responsibilities would eliminate this kind of promotional position from consideration.

A for-profit company also has you as their product's representative. You often are the only person the buyer sees. You must be gracious and have a pleasant manner so the clients feel the company cares about having their business. The online promoter has to take the initiative in matters of convenience and service. The opposite is also true, that any lack of amenity—coffee, heat, chairs, publicity, handouts—no matter whose responsibility—or less-than-gracious telephone manners will reflect on you, your product, and your company. Oftentimes the lack of an amenity is all the client remembers and the company's representative cannot take that chance. A for-profit company normally budgets for convenience and amenities at product demonstrations to project a good image and an online promoter should expect this.

A fifth difference related to the for-profit aspect of most database producers or vendors is the direct contact with the buyer. A traditional librarian has a higher number of patrons, but the online promoter has to deal with a few (but very important) paying customers. Most libraries are intermediary service units. Although many special librarians are in for-profit organizations, their patrons are the internal staff who in turn serve the paying customer. Most special librarians are seldom in direct contact with the paying customer. Even though academic, public and school libraries deal with their users directly, these libraries are usually nonprofit organizations, and so a different atmosphere exists there. For-profit information professionals—like information brokers, document-delivery agents, consultants, as well as database producers—usually deal directly with the paying customer. The transactions involve more eagerness and more expectations for one's money on the part of each. This is true even though the paying customer for the online professional is most often a librarian, because that librarian pays for part of the database every time he or she searches. When you represent

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for-profit companies at a conference, for example, it is best to be natural. Yet you are still “on stage” and conference work can be surprisingly exhausting.

A sixth and last difference is that the promotional areas of the online industry require graphic skills. An evaluative knowledge of such skills is very useful, even if you are not directly involved in designing or formatting brochures or exhibit booths. You will be the quality control and production manager for the printed material representing your company. In order to evaluate and administer the production of printed material, you must know simple design, mock-up, paper types, ink colors, and graphic designers’/printers’ jargon and expect to deal with time requirements. None of these skills is taught in library school, and together they represent very different job aspects than those required in most traditional library settings. I might add that these skills could be useful in any library, as it expands its outreach publicity.

These similarities and differences in skills have been listed for the reader’s reflection and as such, I have not judged either librarianship or the online profession to be better or worse. Choosing between jobs in the online industry or in librarianship depends on the individual’s assessment of his or her own strengths, in light of those skills central to each profession. Yet, even in the absence of an overall judgment, there are a few attributes of online industry jobs I would like to mention that might help a person choose *among* jobs within the industry.

### **Attributes of the Online Industry Experience**

The first pro or con is that database-product quality varies considerably. If you found yourself in the position of representing a poorly organized database product, the job would be difficult. If you disagreed with the marketing plan, indexing policy, proofreading practices, or searchable fields of the database; or if you had no say in those policies; your job would be out of your control. In such a situation, you must sell a product you do not fully endorse or you must quit. In most for-profit promotional positions, you cannot hide in an administrative niche—as in some large institutions—and just do your own job well. If you are the promoter, you are on the front line and are the person to whom the clients complain. This shows why you should be a critical interviewer when job hunting in the online industry. Before accepting a position, you should ask any database producer about policies, database configuration, and decision-making procedures; and you should ask how you would be involved in each of these aspects.



The refreshing part is the obverse of the coin: If the database is a good product, it practically sells itself and is fun to talk about. Promoters who have been involved in the decision-making and understand and agree with the indexing policies can answer questions succinctly and feel confident that the database product will assist the buyer as outlined. It is especially comforting to be a trained librarian talking to librarians about a high-quality product. Even if a librarian's needs do not jibe with the database, you can say that with confidence and know that your product never claimed to answer all questions for all comers.

My second general attribute is that no matter how great the database product is, if you are giving the same presentation/training speech for the fifth time in five days, it is very difficult to sound fresh and excited. Applying teaching techniques can help in altering presentations for each audience's interest with the added advantage of making the presentation new and different for you. But the more frequently you travel and present, the more difficult this becomes. A satisfying division of time for me was presenting/traveling 25 percent of the time and administering the marketing department 75 percent of the time. Each person would need to reflect and then inquire of their possible database employer about this time balance.

To give an idea of what a marketing coordinator might do, I will list some typical tasks. Many of these were alluded to in the description of similarities and differences between traditional and nontraditional settings. I would like to restate that one-quarter to one-third of my work time was spent sorting priorities among the duties listed below:

- arrange upcoming conferences, presentations, and training sessions;
- coordinate operations at conferences, presentations and training sessions;
- represent the company at some conferences, presentations and training sessions;
- plan marketing department budgets and expenditures;
- coordinate marketing department correspondence;
- find database directories and place descriptions in them of your product;
- survey professional magazines for advertising opportunities and new technologies;
- supervise exhibit and brochure design;
- organize brochure mailings;
- write advertising copy of various lengths for insertion in journals, newsletters, brochures, directories, etc.;

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- develop presentation text: handouts, script and sample searches;
- explore opportunities for scholarly articles or product reviews for staff;
- find local professional associations (e.g., online user groups) around the country;
- make and receive phone calls on all these items and record the results;
- supervise marketing clerical staff;
- look for new database prospects; and
- advertise tape leasing feature.

### **Summary**

Not everyone is good at all the tasks in an online promotional position and not all promotional positions are the same. Also, there are a variety of nonpromotional jobs with database producers and vendors—such as software or computer specialists, database designers, indexers, editors, or managers. Many of the skills—especially the most conceptual—are transferable from skills learned within a traditional library setting. A source of satisfaction and enjoyment for me in any job is the diversity of tasks performed and subjects explored. Diverse tasks and subjects are evident in librarianship as well as in the online industry; the tasks and subjects are only a little different in each. Now that I am an academic librarian, I can see that both traditional and nontraditional jobs are attractive. I hope to enter into a bit of both worlds by consulting while working in an academic library.

Traits that I feel are of overall importance in a promotional online position are: online searching ability, training skills, graphics knowledge, organizational abilities, management skills, and above all, patience and tact. Not all good online professionals are librarians by training and not all librarians would be good online professionals. But, the two have many conceptual connections and both groups can learn from the other: online professionals may learn more about library-specific user needs and librarians may become more proactive, less reactive—becoming interactive in professional as well as technology-based ways.

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# Establishing a Business: Fundamental Aspects for Information Practitioners

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JAMES A. LEACH  
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OPPORTUNITIES EXIST TODAY for information practitioners to establish consulting businesses. Undoubtedly, many information practitioners have had opportunities to provide consultant assistance for pay, but have been limited by the scope of a traditional setting, combined with an ignorance of what it takes to set themselves up in business. Library schools generally emphasize professional training for institutional work environments. As F. W. Lancaster describes: "The library profession is the most 'institution bound' of the professions, and the electronic age will force librarians to abandon the building to remain viable...."<sup>1</sup> Lancaster seems to indicate that preparation for the traditional environment for librarians might not be adequate and that a glimpse into the future might reveal what S.D. Neill (a professor at the School of Library and Information Science, University of Western Ontario, London, Ontario) predicts: "Close to 60% of the graduates of library schools in 2010 will be self employed or will work out of libraries under contract to small businesses....Access to information (not books) will be provided by those going into business for themselves—very few in the 1980's, but in increasing numbers as the next decade begins."<sup>2</sup> For some, nonetheless, this future is here now and the need to know and learn about consulting services is necessary. Futurist Alvin Toffler foresees a new dimension of the probable continued growth and economic importance of the "electronic cottage." This term refers to homes—rather than

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offices and factories—where work is being done primarily through the use of microcomputers and remote computer terminals. Many of these people will be self-employed and many will be information practitioners.

The basis for economic growth in the United States has shifted from industrial needs to needs for services and information. Employment growth has occurred overwhelmingly in these sectors. Indeed, we are said to be living in an information society. Information “experts” will become increasingly important to all types of businesses, large and small.

However, most information practitioners have not pursued opportunities to establish a business and provide consultant assistance for pay. The primary reasons for little initiative in this direction may be a misconception that establishing a business requires full-time effort and also an ignorance of the procedures for establishing a consulting business.

Establishing a business in the field of information practice does not necessarily require a full-time effort nor does it necessitate leaving the security of current employment. Information practitioners are in an ideal position to establish a business without assuming all the normally associated risks. Many information practitioners can pursue a consulting business as a second or part-time job. Minimal financial investment is required to establish the business since most of the costs involved in providing consulting services are variable. In other words, the consultant has minimal costs or expenses until the work is performed. Unlike most businesses, large amounts of inventory, employees, equipment, and facilities are not required prior to opening the business.

In most cases, operating a business successfully requires a working knowledge of traditional management skills. Therefore the majority of this article deals with the fundamental aspects of establishing a business. However, several personal qualities are, perhaps, even more important. Before getting down to the nuts and bolts practical side, information practitioners considering establishing a business should evaluate themselves in light of these necessary personal qualities.

## **Entrepreneurial Characteristics**

### *Creativity and Innovation*

Creativity and innovation are complementary. In order to be innovative one must be somewhat creative. Creativity has been defined as a combination of new and old ideas which will better satisfy a need. The application of creativity may be an important reason for the success of

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any business. The formation of the business itself is a creative act. Creativity can help in the long-range forecasting of the future role of the business and of the future environment in which the business will operate. Successful business owners are perceptive, farsighted and resourceful.

### *Coping with Change and Competition*

Effective business operators should not be interested merely in making a reasonable return on their investment in the current year. They must also look ahead and, to a greater or lesser degree, prepare plans for the business five to ten years in the future. It is possible to get some idea of the extent of future change when one reflects on the tremendous changes that have occurred in the past ten years. Changes in the future will continue at an accelerated rate. In order to be successful in the future, the self-employed person must become adept at coping with change. This requires flexibility and versatility.

### *Achievement Motivation*

Successful entrepreneurs have been described as people who have high need achievement. Need achievers take moderate risks, take responsibility for their actions, look actively for feedback to improve performance, and have a propensity to action. They do not wait for things to happen.

### *Problem Solving and Decision-Making*

The success of the business depends to a large extent on the individual's ability to solve problems and make decisions quickly. Business owners must be aware of problems, clarify problem situations, collect information, identify alternative solutions, select best alternative solutions, take action, and evaluate results.

### *Human Relations Ability*

Human factors, both in relation to employees and clients, are an important ingredient of success, especially in small business. Ability to have personal contact with clients is a decided advantage which the small business owner has over its larger competitors. Clients' needs are a prime consideration. The marketing strategies of many small businesses are client oriented rather than product oriented.

### *Developing a Positive Self-Image*

A positive self-image begins with an awareness of self. Prospective business operators must be willing to spend time evaluating their own

personalities. Personal strengths and weaknesses must be identified and understood. They must be willing to make an effort to change or modify any negative or unwanted personal traits. In addition, business operators must be tenacious. They must be able to accept failure and bounce back.

Information practitioners who possess these personality traits are likely to have considered establishing a consulting business. Moving from the consideration stage to the implementation stage requires a knowledge of key procedures and a willingness to proceed.

### **Key Steps for Organizing a Consulting Business**

The following list and discussion of key steps for organizing a consulting business is not exhaustive or all-encompassing. Each of the four major steps described should be broken down to smaller more specific procedures or tasks. Much has been written on each of the four steps. Information practitioners who are serious about establishing a consulting business should use the information presented here as a starting point for further action. Although the steps are presented in somewhat of a logical sequence, in reality much of the activity or procedures will be occurring simultaneously.

#### *Step 1: Identify and Define Salable Service*

The consulting business most likely to succeed is one which is based on a service that clients will pay for in sufficient volume to generate a profit. In order for a consulting business to be successful and profitable, there must be an adequate market for its services. The failure of many consulting businesses can be traced to the inability to identify and define a salable service. The enthusiasm of prospective consultants can often cause them to overlook this most basic business premise. The basic purpose of a consulting business is to provide services that clients need or want. Providing services which might sell is not likely to lead to much success. Before entering into the operation of a consulting business, it is, therefore, essential to determine just what services can be provided and whether a market exists for these services.

Closely linked with the creation of the consulting business as an organization is the establishment of limits. The work for which the business competes, or which is undertaken, should "fit" the image the business is attempting to create. A business which tries to be all things to all people runs the risk of being viewed as less expert or professional than competitors whose focus is more specific. No consulting business

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can respond to every funding opportunity nor meet the specialized needs of all potential clients. The diversity of interests among potential clients is so great that no consulting business could possibly deal with them all. Consultants who respond to every request for proposal or opportunity, regardless of their expertise, will find they spend all their time writing proposals, losing credibility, and not receiving awards and contracts. Rather than engaging in aimless wandering for funds, it is important that the business develop a reputation, credibility and expertise in specialized areas.

It is absolutely necessary that limits be imposed upon consulting interests. One way is to list the areas of expertise of both yourself and associates of the consulting business. From that list a statement of goals can be developed.

The development of a well-written goal statement that can be used to make decisions about future activities is important. When new opportunities arise the consultant can use the statement to judge a response. There is no lack of potential clients. A clear goal acts to screen out unproductive areas and focuses efforts upon realistic opportunities. When developing goal statements for the consulting business, keep in mind that making money cannot be a goal. A goal deals with particular topics or areas of expertise. Potential clients are not looking for consultants that want money, they are seeking solutions to problems.

Every consulting business sells some type of service to people. These people, or potential clients, can be described as people who *need or want* the services, are *able to buy* the services, and are *willing to buy* the services. The market for the consulting business is not comprised of all the people in a geographic area or within a given field, but only those who need the service and are willing and able to buy it. One way to begin to determine the market is to develop a list of agencies, institutions and individuals who need or want the services. The list can then be reduced to those who are able, and then to those who have a record of being willing to pay for consulting services. This market segmentation can be useful in helping to identify "real" potential clients.

### *Step 2: Determine the Legal Form of Organization*

One of the first decisions a consultant must make is to determine the form of legal organization of the business. However, this initial decision should not be considered as final. Not only will the business grow and alter its operation over time, but financial and tax situations may modify the advantages and disadvantages of the various forms of legal organization.



The vast majority of the consulting businesses in the United States are organized as one of three legal forms. They are the sole proprietorship, the partnership and the corporation. The sole proprietorship has only one owner. A partnership has two or more co-owners. A corporation is an association of stockholders or owners chartered by the state. The corporation has the authority to transact business in the same manner as one person.

There are other less common forms of legal organization, such as the subchapter-S corporation, the business trust, the partnership association, and the joint stock company available to the consulting business. Although most businesses are organized as a sole proprietorship, partnership or corporation, all forms of legal organization should be discussed with a competent attorney before any decision regarding which form to select is made.

The consultant should have a basic knowledge of the legal forms of organization available to the business, and should be aware of the relative advantages and disadvantages of each form of organization. Competent legal advice should be obtained when deciding which legal form to adopt. Basing the decision on form of organization on a business colleague's advice or experience is not sufficient. Factors such as current salary, other income, value of personal property, marital and family status, and amount of consulting income (which vary among individuals) can be important when making the decision. When discussing the decision with an attorney and an accountant, it is crucial that all such information be shared openly in order to obtain the best advice.

Generally, there are no special licenses required for a consulting business. When starting a sole proprietorship the only requirements are to determine if a license is required for the particular consulting business. The best way to determine if licenses, fees or registration are required is to check with an attorney. The business will be required to identify itself on tax forms and any required licenses by either the owner's social security number or a Federal Employer Identification Number. A social security number is all the identification required until employees are hired. Because of the limited restrictions, the sole proprietorship is the easiest to start and the initial costs are minimal.

### *Step 3: Establish an Identity for the Business*

Generally, a consultant's reputation or identity is the result of success over time. During the initiation phase of the business, there is likely to be a great divergence between the image or identity desired to be

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projected to potential clients and the actual substance to back it up. It is most important during this time that actions, statements, literature, and promotional methods do not project the impression of an amateur, unprofessional or fly-by-night operation.

Presenting a professional image of the business is as important to establishing an identity and securing consulting work as the actual services provided. Methods should be used to create an image which is consistent with the type and quality of services provided. Establishing an identity for the consulting business is closely related to promoting and selling services. Creating the image of an established professional organization and becoming visible will help to establish an identity for the business.

For the consulting business, the notion of organization goes beyond designing a structure for operational efficiency for legal organization. The existence of an organization communicates a sense of pooled resources, potential and permanency. An organization can be formed instantly by the creation of a label or name for the consulting business.

The name selected should be consistent with, and descriptive of, the services provided and should help to create the image of a "company" prepared to meet a focused need and to deliver a service or product.

The business name should be pleasant sounding and easy to pronounce. It should tell people what the business does. However, while being descriptive of services provided by the consulting business, it should not severely limit opportunities and should stand up to the passage of time. In some states or localities it is necessary to file a fictitious name statement if the business goes by any name other than the owner's real name.

The identity and credibility of the consulting business is developed in part by the potential clients' perceived significance or value of the business' resources, primarily people. The utilization of a pool of talented and interested individuals identified as associates can add to the business' resources. Individuals from this pool of resources can be called upon for their specific expertise when needed.

A simple technique used by many consulting businesses is to maintain a résumé file of individuals with varying expertise who have agreed to be identified from time to time as associates of the organization. After a telephone call for permission, a résumé can be copied and added to proposals or prospecti. Identifying and using an individual or individuals as associates at appropriate times can lend further credibility and identity to the consulting business and enhance its image as an organization.

A major part of establishing an identity for the consulting business is to create and maintain visibility. One element of visibility is communication.

Communication in this sense refers to the processes of giving and getting information. Development of a resource network is critical for communication. It can serve three purposes. First, by pursuing an ongoing dialogue with individuals in the field(s) within which the services are needed or utilized, the number of potential resources for consulting efforts is increased. Second, a planned sequence of contact increases collegial awareness and can provide information about potential opportunities for the consulting business. To establish an identity, it is critically important that informal dissemination of the business' existence take place. Third, communication through a network of individuals can provide clues that provide notice of forthcoming opportunities. A common complaint from isolated consultants is that announcements of opportunities always arrive too late or with such a limited time frame that response is harried and not as effective as it otherwise might be. An effort to both give and receive information through a network of individuals can enhance visibility and make a difference in the competitive consulting field.

Although informal communication through a resource network is extremely important, it should not be used as a substitute for a formal communication system. Target audiences for services must be identified and communicated with. The individuals who comprise the resource network can serve as the nucleus of a dissemination list. To develop a list of individuals with whom communication is essential, people must be identified who need to know about the existence of the consulting business. If specific people cannot be identified then positions should be listed.

Communication is most effective through a planned system of information dissemination. Giving information about the consulting business enhances visibility and creates a vehicle for the return of information. Personal interaction is important, but it is not the most effective or efficient approach. The easiest method for increasing visibility through dissemination of information is with printed materials delivered to a well-defined target audience. The dissemination list provides a target audience.

#### *Step 4: Managing Financial Aspects of Delivering Services*

Financial control and management is a very important aspect of any business, yet it is an oftentimes neglected activity. Many profession-

als who invest their energies and expertise in consulting work, direct all or almost all of their attention to the act of consulting and may not pay adequate attention to financial record keeping and management. Three fundamental aspects of financial control and management are: (1) pricing consulting services, (2) billing consulting services and expenses, and (3) record keeping.

Pricing in a service business is much more difficult than pricing in a product sales business. A product can be observed, compared and further analyzed prior to purchase. The price is explicitly stated which enables the buyer to make cost comparisons and/or to compare characteristics of the product to its cost. When a service is purchased, the buyer oftentimes sees only the expenditure of labor and the results of that labor. The buyer then generally equates the (see p. 13) costs of professional preparation, necessary equipment, preparation time, travel time, and other related costs. In a consulting business, the buyer of services usually sees only the consultant on-site and may miss a large portion of invested energies expended in planning, following up and reporting. Therefore, a pricing policy needs to be established to set a standard of quality and reputation for one's services, and to portray the total service or job to the client.

A pricing policy is a guide for determining what to charge for specific consulting activities and a means of consistently doing so. Establishing a pricing policy is difficult, but it will assist in avoiding potential problems in the long-term operation of the business. The establishment of a pricing policy for a consulting business depends on the type of consulting, the client, the expertise and uniqueness of the expertise being sold, the duration of the service, and other like factors. Generally, however, the consultant should follow these general steps: (1) obtain an estimate of what other similar consultants charge; (2) identify and list the major types of consulting services to be provided; (3) group the potential services into categories that relate to complexity or degree of skill required; (4) delineate labor costs for each of the categories; (5) identify and analyze other costs associated with the consulting services; and (6) summarize the pricing policy on paper for future use.

Billing for services and expenses is a task closely associated with pricing and managing the delivery of services. The billing process is a fairly simple one and is usually linked directly with previous arrangements for payment. These arrangements are most often tied to some oral or written agreements that are made in the initial stages of a consulting job. Many small jobs are billed upon completion while larger ones may have allowances for periodic billing and payment.

Regardless of the period of payment of billing, the process remains essentially the same. This involves the preparation and submission of an invoice, statement or claim form. The invoice or statement is a form that is sometimes specially printed or typewritten on business letterhead. A narrative description of the services that were provided and expenses that were incurred are included. In some cases consulting work done for specific agencies may require the use of agency-specific claim forms. Of course, the preparation of billing statements or claims should be based upon records of labor expenditures and upon records of other costs.

Record keeping is an important aspect of a successful consulting business. Record keeping is important not only for tax purposes, but also for billing, decision-making and planning.

A key principle in managing the financial aspects of a consulting business is to keep consulting expenditures separate from personal expenditures. Likewise, a separate accounting of consulting income is useful for record keeping and tax reporting. A business checking-account is extremely useful in keeping an accurate record of consulting expenses. A credit card used only for business expenses may also be useful. All consulting income should be recorded in some form. One way to accomplish this is to deposit all consulting income into the business checking-account. An income ledger will also provide a record of consulting income.

## Conclusion

Information practitioners have opportunities to pursue consulting as a private enterprise. There are advantages for information practitioners in entering a private business venture and there are not as many barriers to overcome as others find when establishing a completely new business. However, the success encountered in establishing a consulting business will be proportionate to proper preparation in three ways: (1) knowledge of their own profession in the information field, (2) knowledge of business operations, and (3) knowledge of their personal strengths and weaknesses.

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# Implications for Library and Information Science Education

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F.W. LANCASTER

THERE IS CONSIDERABLE SUPPORT for the belief that librarianship is the most institutionalized of professions. Library education, for example, began its life in schools established within libraries and even today many library schools are physically located within library buildings. The institutionalization is clearly reflected in the names of our professional societies. It is significant, I believe, that we speak of "library associations" rather than "librarian associations"; it is even more significant that we tend to think of "library schools" rather than "librarian schools."

There is at least one obvious reason for this situation. Libraries existed before librarians did. Moreover, for several centuries the librarian was little more than a custodian or curator of materials. The librarian as provider of some form of professional service is a comparatively new phenomenon. This historical accident may explain why the library, rather than the librarian, has traditionally been the focus of our attention as a profession. It completely fails to explain why we still seem to concentrate on a physical facility—a building housing artifacts—rather than on the technical expertise of skilled practitioners, which is surely the most important thing that the profession has to offer.

Since it is the institution that has been emphasized by librarians themselves, it is little wonder that dictionaries still tend to define "librarian" as "a keeper or custodian of a library." It is also hardly surprising that the public at large thinks of a librarian only as "someone

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who works in a library" and librarianship as "what goes on in a library." Because many of the activities most visible in libraries are routine and repetitive, the public can hardly be blamed for failing to recognize the librarian as a skilled professional practitioner. Our image and status suffer as a direct consequence of our own misguided emphases. Even today the public relations message of the profession is "visit your library" rather than "consult your librarian."

I am not the first person to decry this preoccupation with the library as an institution. Giuliano<sup>1</sup> did this admirably more than a decade ago. In an unusually perspicacious paper, regrettably much overlooked, Giuliano draws an analogy between librarianship and medicine. Our focus on the library as an institution would find its equivalent in the medical profession if it focused its attention on the hospital as the major institutional element in health-care delivery. By the same token, if medical education were modeled on library education, it would seek to prepare "hospitalarians" rather than physicians.

There is no more justification for defining modern librarianship as "what goes on in a library" than there is for defining medicine as "what goes on in a hospital." Many different types of professionals may work in the environment of a hospital—not only physicians but pharmacists, nurses, dieticians, a whole host of skilled technicians (such as radiologists), and, of course, hospital administrators. All of these require different types and levels of education and training and they receive this diversity through completely different programs. Only the hospital administrator (and supporting administrative staff), of all these categories, is exclusively associated with the hospital as an institution. Physicians certainly can operate outside a hospital; so can nurses, pharmacists and others.

The library is in many ways less complex than the hospital. Nevertheless, is it realistic to suppose that the diverse professional skills associated with the operation of libraries, and information centers in general, can all be presented within the context of a single educational program, which is what our library schools seem to assume? The equivalent assumption in medicine would be that all who work in a hospital require the same body of knowledge, which is clearly absurd. Yet, in effect, the library profession fails to distinguish its physicians from its hospital administrators or even, on occasions, from its nurses and pharmacists.

The fact is, of course, that librarians have traditionally been more dependent on the library than physicians have been on the hospital, pharmacy or other facility. The librarian needed access to books and

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other physical artifacts in order to answer factual questions, prepare bibliographies and, to a lesser extent, advise people what to read to satisfy particular desires or needs. But the librarian may have made himself more dependent on the library than was strictly necessary. A physician can prescribe drugs without actually working in a pharmacy. A librarian, on the other hand, seems unable or unwilling to prescribe reading materials or information sources unless from a desk in the library.

This overdependence on a physical facility has had undesirable consequences. For one thing, it has tended to blur and confuse quite different activities. It is my contention that the major professional tasks that librarians perform are all tasks in which the librarian acts as a type of consultant. The librarian is, or should be, a recorded knowledge consultant in much the same way that the physician is primarily a health-care consultant. The prescribing of informational/reading materials is an important professional activity of librarians. The location and delivery of these materials, once prescribed, is not a professional task; at least, it is a task requiring a different type and level of expertise. A physician prescribes drugs but we go to the pharmacist to locate and deliver them. In the library profession we fail to distinguish the diverse levels of expertise and experience implied in diagnosis and prescription, location and delivery, and even the arrangement of the drugs on the pharmacy shelves. A second undesirable consequence is that the institution has offered a virtual sanctuary for some librarians, who have found plausible excuses for staying hidden there rather than venturing out to meet and be met by the various constituencies they are to serve.

### **Some Deinstitutionalization**

In the past there has been some functioning of librarians outside the library environment. A notable example dates back to the beginning of the century: the subject bibliographers, affiliated with a German university library, but functioning in academic departments corresponding to their own areas of expertise. This idea of an information specialist as an integral component of an academic faculty has been slow to catch on elsewhere.

The so-called "clinical medical librarian," while working from a medical library, has achieved a more complete association with the health-care process by attending patient rounds in hospitals and participating in clinical conferences. Consequently, such librarians are more



readily accepted as legitimate members of a health-care team. More importantly, closer association with the health-care process has brought about a better understanding of the information needs arising from this process.

Over the years there has been some level of experimentation with "floating librarians" in the public library setting. Recently such experimentation has matured into "team librarianship," a concept that has emerged within the public library movement in the United Kingdom. In team librarianship the library is operated by nonprofessionals while the professionals work outside the library in a more direct relationship with the people they are to serve.

The origin of the "information broker" has been traced back more than fifty years. Nevertheless, it is only within the last ten years or so that an explosion of fee-based information services has occurred. The information broker is a free-lance librarian, operating outside the confines of a particular institution; he is a deinstitutionalized librarian.

There is, then, some evidence of deinstitutionalization in the profession, although the trends have so far caused ripples rather than real waves. However, now there is at least a glimmer of recognition that librarians need not necessarily work in libraries.

### **Impact of Technology**

It is my belief that the process of deinstitutionalization will accelerate very dramatically in the next few years. The fact is that computer and telecommunications technologies are making it increasingly feasible for librarians to perform their professional tasks outside of the library.

Technology has affected libraries in two quite different ways. First, computer processing has been applied to "library automation," to the "housekeeping" or inventory-control activities of libraries. This is really a trivial application. It affects the manipulation of records representing physical artifacts but has virtually no effect on the way the artifacts themselves are handled. Indeed, the artifacts are dealt with in libraries much as they were a century ago. Clearly, a library with automated records is only cosmetically different from one without; the public would be hard put to notice any difference. Not a fundamental metamorphosis of the library!

The second effect, however, is fundamental and far-reaching, so far-reaching that it promises to change our whole concept of what a library is or should be. It also changes our whole notion of what librarianship means. This effect, which results from the application of

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computers to publishing and the distribution of information, is the ability to use this technology to access remote sources of information ("databases" or "databanks"), i.e., sources not physically present on the shelves of the library.

I have discussed the implications of this development in detail elsewhere<sup>2</sup> and it seems pointless to repeat such detail here. Suffice to say that machine-readable information sources—only about twenty years old—and the ability to access such resources through telecommunications networks—a development of only the last decade or so—have increased the quality of information service that libraries (especially small ones) can provide by literally an order of magnitude, have created a process of geographic democratization (it matters less and less where one happens to be in terms of access to information), are having a profound and positive effect on the economics of information provision, and, perhaps most importantly, are causing the gradual disembodiment of the library. The library without walls already exists.

The disembodiment process will certainly continue. For some special libraries, it would be true to say that the information sources that can be accessed through telecommunications networks are already more important than those owned and sitting on library shelves. In the longer term, access will actually supplant ownership as print on paper is gradually replaced by electronic publishing. If we carry this to its logical conclusion, of course, the collections of all libraries become the same, for all will have access to any electronic item, as and when it is needed, providing only that they can pay for this access.

In point of fact, however, libraries as we know them seem likely to disappear. Facilities will still exist to preserve the print-on-paper record of the past, of course, but they will be more like archives, or even museums, providing little in the way of public service. As for the electronic sources, libraries may have an interim role to play, and may play this role for the next twenty to thirty years. The interim role is to subsidize access to electronic publications in the way the library has traditionally subsidized access to print on paper. In the longer term it seems certain that the library will be bypassed. That is, people will have very little reason to visit libraries in order to achieve access to information resources. I believe it is highly significant that the owner of a home computer, or the householder having certain forms of interactive television available, is in about the same position vis-à-vis access to electronic information sources that libraries were only a decade ago.

## The Future of the Librarian

In short, I see little future for the library. But what of the librarian? I have already claimed that such a professional need not operate from a library. Technological advances continue to reduce dependence on a physical facility housing physical artifacts. It seems possible, then, that the librarian could long outlive the library. In an age of electronics, we may need "electronic librarians." In an age of information, information specialists may increase rather than decline in value.

The future of the librarian as a skilled information consultant seems to depend upon answers to a number of critical questions:

1. Will the demand for information increase?
2. Will people need professional help in solving their information problems?
3. Will the library profession be able to adapt to a rapidly changing environment and to respond to the challenges it presents?

The characteristics of the "information age" strongly suggest that the pursuit and processing of information will become increasingly important throughout all segments of society. An "information skilled populace" will be needed to implement and exploit new technologies applied to all aspects of human endeavor. Demands for information resources may also increase through other stimuli—the need to support "lifelong learning," to enhance use of leisure time, and to satisfy the public's growing interest in "participation" in the broadest sense (e.g., more direct involvement in their own health care). Because the collection, processing and dissemination of information is becoming such an essential element in our lives, librarians, as skilled information providers, could gain considerably in both value and recognition.

The second question is more troublesome. If publications and information sources of all types become readily accessible to the public through home computers or through interactive television, will our "information skilled populace" be so familiar with these sources, and will they have become so easy to use, that professional information specialists will no longer be needed? Stefani<sup>8</sup> believes this to be true:

Technological advances and economic factors will probably end the intermediary-client relationship altogether. If online use instruction and command languages are developed so that end users can easily manipulate their own searches, an intermediary will no longer be necessary. Furthermore, if search costs are reduced, the economic value of the expertise of the search intermediary will decrease, and the intermediary's services will be bypassed.

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In the longer term she may well be correct. In the shorter term, however, information specialists will survive much beyond the time when the library, as a service institution, has ceased to exist.

Electronic sources will proliferate so rapidly that personal guides to these sources will be much needed. It may be a long time before we can construct vast electronic networks that can proceed to select the source most appropriate to any information need and search it "transparently" to the user. Research and development is proceeding on many of the elements of such a network but it certainly cannot be considered as just around the corner. In the meantime, information specialists will be needed as guides to these resources and, in some cases, as interpreters of their results.

It seems likely that the information professionals of the future must be more specialized in terms of the subject matter they deal with. Very possibly they will be expected to perform an "information analysis" type of function: searching, selecting the best of the information retrieved, and submitting the evaluated results to the requester. The information specialist, then, is essentially an information consultant. Horton<sup>4</sup> refers to this type of person as an "information counselor"; one important role such a professional will play is simply helping people "better articulate their information requirements...." Information specialists of the future can also be expected to play a more active role in education and training since they will be the ones most qualified to teach people how to select sources, how to access them, and how to exploit them.

There will also be other tasks for information specialists—in the planning/design of electronic publications, in the design and operation of electronic networks, in the organization of electronic information files (for institutions but also, perhaps, for individuals), in devising and implementing new types of information services, and keeping clients aware of new information sources as they become available.

Kochen<sup>5</sup> believes that the information professional of the future will play a more important role than is true today:

This information professional is likely to be employed as a facilitator or linker, as a kingpin in a network in which control is shared by service providers and their clients in jointly coping with complex tasks. It will be an occupation of great responsibility, requiring correspondingly high standards of admission to and training for the profession.

These information professionals can be looked upon as "electronic librarians." They are, however, librarians without libraries. Electronic

networks will be used to communicate with clients as well as with information sources. Reintjes<sup>6</sup> recognized the importance of librarians of this kind:

In future integrated information-transfer networks, librarians will be the most valuable human resources of the network. Their detailed knowledge of the contents of the network and their ability to employ retrieval techniques that will extract the maximum amount of information from it will create intense demand for their expert services.

The information age is not exclusively an age of electronics. As Horton<sup>7</sup> points out, it is also an age in which highly skilled human resources will be in great demand:

Exploiting the full potential of the Information Age is going to require a basic rethinking of traditional Industrial Age yardsticks—placing the emphasis on creativity, talent, and brainpower. Those are the real “capital assets” of the Information Economy, not information handling machines. Certainly none of this would be possible without the computer and the electronic chip and satellite and other technological breakthroughs. But their distinctive contribution is still in making processes go faster, more efficiently, and reducing the unit cost of information handling. The real payoff is going to come in training and grooming new kinds of Information Age human resources.

This last sentence is particularly significant. Who is to train and groom these information professionals? What are they to be trained in?

### **Education for the Profession**

The really critical question is “can the profession adapt to a rapidly changing social and technological environment?” If it is to respond positively, it seems clear that the lead must come from our professional education.

Commendably, some attention is now being paid to the identification of professional competencies that will be needed in the information specialist of the future. The Department of Education has recently funded such a study and the Commission of the European Communities has funded the development of a detailed “profile” of the “information intermediary,” including specific competencies needed and the implications for education and training.

This attention is long overdue. Regrettably, our schools have been as institutionalized as the rest of the profession. It would not be too uncharitable to say that “what goes on in a library” is still the principal

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focus of our collective curricula. In some schools, I suspect and fear, it is the sole substance of the instruction.

The term *information science* is relatively new. Even the expression "information retrieval," which we now take completely for granted, did not come into use until after the Second World War. Borko<sup>8</sup> has defined *information science* as follows:

That discipline that investigates the properties and behavior of information, the forces governing the flow of information and the means of processing information for optimum accessibility and usability....It has both a pure science component which inquires into the subject without regard to its application and an applied science component, which develops services and products.

This certainly seems comprehensive. In effect, it states that information science is concerned with all phenomena and aspects of the information transfer process.

Clearly, by this definition, information science existed long before the label "information science" appeared. Nevertheless, information science has only emerged as a recognized field within the past thirty years or so. Certainly there were no "information scientists" earlier, although there were "documentalists" and, of course, librarians.

Some curious anomalies have occurred in these thirty years vis-à-vis the relationship between information science and library science. In the first place, it is undoubtedly true that the great majority of those who call themselves information scientists (and who are, for example, members of the American Society for Information Science) are not librarians and have not received any formal education in library science. It would also be hard to dispute the fact that most of the major advances in information science have come from outside the library profession. On the other hand, it is our traditional library schools that are providing whatever information science education exists, at least in the English-speaking world. There are, it is true, a few other institutions that have "information science" programs. On closer inspection, however, it turns out that these are really programs in computer science. An educational institution that regards "information science" as synonymous with "computer science" can hardly be taken very seriously. There is nothing in Borko's definition that suggests that computers are fundamental to information science, much less that a detailed understanding of computers is essential to the information scientist. Computers are no more relevant to information science than they are to banking, to accounting, to education, to travel agencies. They are useful tools, in information science as in other fields of endeavor, the most

useful tools we have ever had, but we must not confuse the tool with the application.

Many of the accredited library schools in this country have already changed their names to "schools of library and information science." I suspect, however, that, almost without exception, the "and" in this title is interpreted only in its Boolean sense: library schools restrict themselves largely to the logical intersection of information science and libraries. They look at information science to the extent that this broad field impinges on the library as an institution. Information science has not permeated our curricula. In fact, it has been essentially patched on to the traditional institutionalized approach. We have nothing more than a cut-and-paste curriculum. Is this the way to provide the leadership the profession needs at this critical time?

The main purpose of this paper is to plead what I feel to be a cause of obvious merit: to shift the focus of our professional concern away from the library as an institution and toward the skilled information professional who, for want of a better term, I will continue to refer to as "librarian." I have argued why the shift should occur, why the librarian need not function within a library, and why the librarian may well outlive the library. Obviously, the focus of our professional education must be the librarian and not the library.

I do not pretend to know in detail what our curriculum should look like. It could be that many of the essential ingredients are already there, in our better schools at least, but that they are just not packaged in the way they should be. Our present packages (i.e., courses) still reflect our preoccupation with the institution.

If we break away from this institutional bias and look upon the librarian as primarily a facilitator of communication (i.e., a facilitator of access to recorded knowledge), it is clear that this individual must be concerned with and knowledgeable on all aspects of information science as reflected in Borko's definition. The substance of the librarians' curriculum, then, can be nothing less than human communication in general, with formal communication receiving most of the emphasis. The librarian must study and be familiar with all aspects of the communication "cycle," from the creation of recorded knowledge (including, of course, the characteristics and motivations of "authors"), through its distribution, its processing by various types of agencies, and its eventual assimilation and application. To the extent that certain of these activities can be performed in or by libraries, the library as an institution should receive more attention; it should not dominate the entire curriculum. The center of our attention must be the professional

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information specialist and how this individual can assist the communication process.

I am afraid that I disagree with many of my colleagues on what competencies will be needed in the librarian of the future. I cannot accept that numeracy is or ever will be as important as literacy. A librarian is, first and foremost, a communicator. For communication among humans, whether formal or informal, words are immeasurably more important than numbers. This situation is unlikely to change in the foreseeable future.

In the last few years, increasing attention has been paid to a wide range of "management skills," including everything from statistics to operations research. In the short term, this was somewhat justifiable since libraries have been growing, becoming more complex, and having to compete more strongly for limited financial resources. Nevertheless, our recent preoccupation with the management sciences is another example of our inability to distinguish the education of the physician from the education of the hospital administrator. This preoccupation should decline in the future. After all, there may not be many libraries around to be managed. This is not to imply that all forms of management skill will be irrelevant to the librarian of the future. The management of large organizations may have little relevance, but basic entrepreneurial skills could be very important.

The librarian of the future will depend heavily on computers and telecommunications networks. He will certainly need to understand the capabilities and limitations of these technologies. This does not mean that he need know how computers work. That the successful exploitation of computer resources requires knowledge of how computers operate is a myth of obscure origin. Millions of people depend for their livelihoods on the driving of automobiles; few of these care to understand in detail how a car works. Moreover, knowing how a car works does not necessarily improve one's driving skills. Much more important to the librarian will be a detailed knowledge of the characteristics of the information resources available through telecommunications networks and in other forms, and how these resources can be exploited most effectively. In librarianship, as in automobiles, the driving skills are more important than the mechanics, at least for most individuals.

This volume is timely. "Atypical careers" presumably means careers for librarians in atypical environments. At present, "atypical" implies "outside the library." This situation will change. In fact, if my predictions are correct, the atypical will become the typical. The survival of the profession may well depend on this.



Let me conclude with a quotation from a futurist who is also a specialist in the management of change:<sup>9</sup>

Today's tidal wave of change is terrifying many people who have depended upon institutions that are now crumbling....As history shows us, during such transformations the institutions that comprise the framework of the dying society crumble and fall apart, a necessary pre-condition to the construction of the new institutions of a new society. Old institutions impede the development of a new age, which has new needs and new people.

Like it or not, the library is becoming just such a crumbling institution. But the library profession now has the opportunity to construct the new type of institution the quotation refers to, an institution based on technical expertise rather than physical facilities. This is a time of change, a time of turmoil, a time of excitement, a time of challenge for the profession. I hope we show ourselves equal to the challenge.

NOTE: This paper is adapted from the author's article, "Future Librarianship: Preparing for an unconventional Career." *Wilson Library Bulletin* 57(July 1983):747-53 and is printed here through the courtesy of H.W. Wilson Company.

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# Librarianship: The New Alternatives and the Old Bundle of Tricks

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GERALD R. SHIELDS

## **Type of Library Competencies**

IT HAS NOT BEEN TOO LONG AGO when one assumed the mantle of professional service (e.g., as a medic, engineer, druggist, lawyer) through a form of apprenticeship. The same could be said for librarians. One learned by working alongside a practicing professional. Today it is obvious that the approach is different, requiring formal education designed to produce a fully formed bud of a professional ready to develop into a full-blown practitioner. That process is recognized and has become part of the accepted practice for producing our medical and legal professionals. But, is it so with the library profession?

Apparently not. Patricia Battin, Columbia University Librarian, is but one of a growing number of critics who claim that the product of a program in education for librarianship does not produce the desired results. Recognizing the salary base as a problem, she still made the following observation: "Many of us have been frustrated in our attempts to achieve substantial increases in salary schedules and to transform our library environments precisely because of the lack of talented, hard-working, and well-trained individuals to take on the resulting challenges and responsibilities."<sup>1</sup> She then proceeds to outline the type of individuals needed in research libraries today:

We need people who have been trained to question assumptions, collect data, resolve conflicts, make informed judgements, and take decisive action. We need people who have been taught to learn how to learn in a constantly changing environment...we need people who

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can speak and write well—and with precision—and who can interact effectively with a broad range of scholarly experts...we need people who welcome the challenge of re-inventing the research library in the technological environment and who are prepared to take the risks involved.<sup>2</sup>

At the same time, the expectations for the development of the school-library media specialist have centered around the establishment of a competency-based education (CBE) designed to “develop skills and attitudes which are essential for performing a set of tasks. Generally, these tasks are specified by a legitimate authority in the field (a formal association or another set of practicing professionals) and have been identified as necessary for success in the given profession.”<sup>3</sup> In New York, the State Education Department has worked closely with library schools in the development of competencies and programs of education specifically aimed at the certification of the school media specialist. Although the process is in place, it has been an admitted problem because, “the nature of graduate education usually leads educators to value a theoretical approach more highly than a practical approach which deals in concretes, sees knowledge as a means to an end, and tends to be convergent, focusing on improving proficiency in specified performances.”<sup>4</sup> Inspection of the programs approved by the New York State Department of Education in comparison with the program tracks taken by those interested in public or academic library careers will show a marked difference in content and course titles selected.

What has happened since those days when Melvil Dewey and others undertook to educate people so that they could have, “the best obtainable advice, with specific suggestions on each of the hundred questions that rise from the time a library is decided to be desirable, till it is in perfect working order”?<sup>5</sup> The launching of formal preparation for library service was a practical matter and the design of the curriculum reflected that need for catalogers, binders, circulation control workers, and book processors. The need for the librarian as scholar was not considered vital. And the development of a training program in library techniques was involved with the turning out of a product thoroughly familiar with the actual tasks of librarianship. From the previous examples, one can detect that vocational concerns have not disappeared but have begun to be identified with a particular institutional setting. The question has to be asked: Have we moved sufficiently along the path of professional development to allow for the diversity called for in the two types of libraries already cited, let alone others? Can we assert that our current program of education for librarianship terminating in a master's degree (usually obtained within a twelve-month period of full-time

attendance) produces an individual ready to start to work, say, in a small rural school-district library, the Princeton University library, a branch of the Detroit Public Library, the central processing center for a nine-county system of public libraries, the reference desk at Antioch College library, or the administrative office for a regional cooperative school-district library? Can anyone graduate from a master's program in library science with the ability to perform in such diverse settings as the production of nonprint media, rural service delivery, cross-disciplinary research, medical information services, specialized automated database research strategies, service to ghetto youth, upward suburban mobility, controlled circulation, or interlibrary loan? Of course not!

### **Continuity in Programs Over Time**

The general concept and content of the programs in education for librarianship have not developed or changed at a rate comparable to that in institutions where the profession primarily practices. As Jesse Shera pointed out about library education in the period between Dewey and the appearance of the 1923 Williamson report:

As many as fifteen or twenty "courses" or "units" were crammed into this year of study, but eventually there was general acceptance of a "core" comprising cataloging and classification, reference and bibliography, book selection, and administration, and beyond these there were a variety of electives.<sup>6</sup>

That description is uncomfortably close to the layout of the program from which I matriculated in 1961. In looking through several catalogs from library schools recently, I found that the similarity has not disappeared. The demand for the practical vocational approach is still very strong and a recent example from the literature can reinforce this contention: "Graduate library education must take a vocational approach and teach highly specialized techniques. Library schools must concentrate on giving students tangible skills that can be used in academic, public, school, or special libraries."<sup>7</sup>

### **Pressures of the Marketplace**

Imagine for a moment that you are entering a library school and are in hope that when you complete the degree requirements you will be able to get your career underway. You have to take the "core" which supposedly gives you the common basis for library performance requirements. Now in the remaining time you must decide on where to

specialize: Which institution? Which type of service? What if you select the wrong one? What if you prepare as a research librarian and when you emerge with degree in hand all the hiring is going on in the school library media centers? If you are as human as the students I have been working with since 1973, you will do everything you can to hedge your bets. The student maxim seems to be to "know a little bit about a lot of things but not a whole lot about any one thing." Is it any wonder that employers are having a hard time finding the type of person needed in their institutions? I have winced any number of times upon hearing that a student who showed ability for a particular type of service in a specific type of institution had accepted a completely different situation. I wondered about the fate of that misplaced person and at the same time wondered about the perceptions of the employer who took on the student. Was this another case where a graduate entered into an institution "ignorant of the day-to-day workings of a library...how to process an interlibrary loan or how to deal with book jobbers and subscription agents."<sup>8</sup>

### Theory v. Practice Debate

Where is the problem? What is the direction library education should be taking, and if it isn't doing so, why isn't it? In the *Standards for Accreditation* used by the American Library Association in evaluating a program leading to the master's degree, it is stated that the curriculum should be a unified whole rather than an aggregate of courses:

It should stress understanding rather than rote learning of facts; principles and skills rather than routines; emphasize the significance of basic and applied research in librarianship and related disciplines; respond to current trends in library development and professional education; promote continuous professional growth.<sup>9</sup>

That statement does not push very strongly for a vocational approach. William R. Eshelman, a one-time Committee on Accreditation (COA) member, claims that it is the COA that is to be blamed. He claims that it, "allowed the number of schools with accredited programs to increase from 33 in 1965 to 69 now, producing a glut of disappointed graduates, spreading competent faculty too thinly across the nation, and creating a spurious demand for faculty with Ph.D. degrees."<sup>10</sup> He insists that a lot of librarianship's identity and employment problems would not be around if the COA had vigorously enforced the standards adopted in

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1972. But he does not voice a concern about the pragmatism of the programs' curricula.

One of the more carefully drawn papers on this subject comes from the Dean of the Graduate Library School at the University of Chicago, W. Boyd Rayward. He speaks of the conflicts that often arise between the practitioner and the educator. He explains that, "a substantial component of the knowledge of librarians is arrived at and quite generally accepted in a pragmatic way through library practice and their shared experience. Such knowledge tends to be empirical, a-historical, and for immediate use."<sup>11</sup> He contrasts this approach to the profession with that of the educator. The very placement of library education in institutions of higher education happened in the belief that there was a possibility that a practice could be developed around librarianship that would allow for a continuous, disciplined, critical, specialized, and unhurried academic scrutiny. Rayward explains:

As academics, library educators take on obligations of a kind that can lead professional practitioners to judge the research of their academic colleagues to be irrelevant, and the programs of education they devise to be unresponsive to the requirements of practice, to the hazards of the front line.<sup>12</sup>

He points out that both the practitioner and the academic have been unsatisfied with the developmental progress of the program of education for librarianship but for different reasons.

### **The Place for "Alternatives"**

One part of the problem not directly dealt with by any of the recent commentators is the one that promotes the concept that there are "alternatives" to librarianship. Although there has been no direct denigration, nevertheless, the implication of less-than-perfect fulfillment resides in the word chosen to designate those who end up with using their master's degrees outside of libraries. To go to a school of library science means to the academic and the practitioner that preparation is being undertaken for placement in an institution performing *library* services. To do anything else is accepting an "alternative."

Commentaries and evaluations of the current scene in librarianship have noted that the application of the librarian's knowledge may well become more than the management and manipulation of *things* as represented in many education programs. F.W. Lancaster, educator and one of the more influential of librarianship's "futurists," has repeatedly made the point that the "major professional tasks that librarians per-

form are all tasks in which the librarian acts as a type of consultant. The librarian is, or should be, a recorded-knowledge consultant in much the same way that the physician is primarily a health care consultant."<sup>13</sup> A recent feature article in the *Wall Street Journal* ran this headline: "As Information Swells, Firms Open Libraries."<sup>14</sup> If one were given to reading headlines only, the assumption would be that the article was about the establishment of the traditional special library layout. Yet there was little of that in the article. The main thrust turned out to be how the librarians were being called upon by various corporation units to assist them in important information-cum-problem-solving needs. Librarians were not being thought of as custodians of the physical operation so much as the kind of *recorded-knowledge consultant* described by Lancaster.

Michael E.D. Koenig reaches much the same conclusion in his commentary in a recent issue of *Datamation*. He points out that by training, the programmer-analyst or data processor (dp) is one who does not like to be bothered with the user. He typified this observation with an adage: "Tell me what you want done and leave me alone to do it." He goes on to characterize some of the training librarians can and do receive in their program of education:

Library schools clearly and deliberately foster a user/service orientation. In addition to reference sources that heavily emphasize the process of identification of information needs, library schools offer courses, such as Human Factors in Information Systems, that focus on themes like the design of user (cordial) systems, information use styles and requirements, and different environmental and cultural attitudes toward information and its use. These are topics that should be, but typically are not, taught in dp programs and business schools. The result is that librarians are particularly well suited to the task of interfacing with users to assess their information requirements.<sup>15</sup>

There would seem to be a new alternative in the works. Instead of being concerned and treating those who manage to obtain gainful and lucrative employment outside the library institution as freaks, we may soon be treating individuals who use their fifth- or sixth-year Master's in Library Science (M.L.S.) to go to work in a *library* as being outside of the normal stream of the profession. Not all library education programs are embracing the user/friendly, interpersonal communications development in their curricula. But more of them may be forced to do so. Russell E. Bidlack, Dean of the library school at Michigan, recently told a group of research librarians that all their demands for talent and creativity from graduates of library schools will be to little avail. His contention was that, "most library schools can cite examples of recent graduates

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whose non-traditional backgrounds would make them highly attractive to a major research library, but who were hired by the information industry at salaries in the \$25,000 to \$30,000 bracket."<sup>16</sup> Bidlack's tale can be embellished to include highly talented and creative people from the humanities and social science fields being grabbed up by the private sector at salaries some librarians cannot demand after ten years in the field.

### **Conclusion**

On many university campuses, programs in education for librarianship are under fire regardless of their length of service and reputation. Bidlack, in his comments to the Association of Research Libraries, implied that highly capable people who are recruited into M.L.S. programs may find upon graduation that their greatest financial and career rewards may be gained outside the traditional type-of-library service. Certainly the current debate about the state of education for librarianship is being fueled by the concern of educators that the content of coursework be defined in such a manner as to enable the schools to meet well-defined needs that will result in a successful placement. Herbert S. White, Dean of Indiana University's library and information science program, has been particularly provocative in his proposals for improving programs in library education. He feels the time for curriculum revision is now when the urge to survive is occupying the minds of so many in library education as well as in the field.<sup>17</sup>

We may have come full circle, from the vocational application of management needs to library functions to an awareness that in our newly emerging "alternatives" we may have arrived at the real meat and potatoes of the profession. It has been over a decade now since Jesse Shera called for a new epistemological discipline in librarianship. It was to be a new body of knowledge about knowledge itself. "The focus of this new discipline should be on the production, flow, integration, and consumption of communicated thought throughout the social fabric."<sup>18</sup> Maybe it is time to return to Shera and begin to understand what has happened since Dewey. Information technologies may well produce a paperless society as predicted by some, and such technology has already made it possible for library (information) professionals to exploit their knowledge and skills to become effective mediators between the user and the graphic record. "Librarianship must be much more than a bundle of tricks taught in a trade school,"<sup>19</sup> said Jesse Shera. Our profession may well meet Shera's challenge under pressure from



financially stricken higher education institutions and the dictates of the information marketplace.

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# Useful Books on Information Brokerage

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PATRICIA E. LOWREY

ANYONE CONSIDERING A career in information brokerage or similar work should be aware of several books which may be helpful in investigating career options. *What Else You Can Do with a Library Degree* (New York: Gaylord with Neal-Schuman, 1980), is a collection of over fifty articles by librarians who have worked in a wide range of alternative careers. Although the articles are brief, this work provides a good overview of the many opportunities available to librarians working outside libraries. Spivack's *Careers in Information* (White Plains, N.Y.: Knowledge Industry Publications, 1982), focuses on information specialists and scientists, librarians and entrepreneurs. This work is a collection of nine essays which discuss the sort of work that information professionals perform, where they work, and how much they earn. Stranch's chapter, "Entrepreneurship in the Information Industry" is thoughtful and well-written and contains helpful advice on getting started, product and service development, and marketing. The appendixes contain lists of publications, appropriate professional associations, and degree programs.

There are also a few works which specifically examine the field of information brokerage. Maranjian and Boss's *Fee-Based Information Services: A Study of a Growing Industry* (New York: Bowker, 1980), presents the results of a 1979 survey of for-profit information services. This work provides a detailed assessment of the industry as well as profiles of specific companies. The chapter on free-lance information

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providers is very informative. This work also includes data on the information industry in Canada and the United Kingdom. *So You Want to be an Information Broker* (Chicago, Ill.: Information Alternative, 1982), is the proceedings of a workshop held by the School of Library and Information Science of the State University of New York at Albany. Syracuse and other universities have also sponsored workshops on information brokerage. Generally, although the papers are often uneven, the bibliographies tend to be quite thorough.

In addition to a considerable body of literature related to small business management, several books are available which are specifically concerned with the operation of an information brokerage. Warnken's *The Information Brokers: How to Start and Operate Your Own Fee-Based Service* (New York: Bowker, 1981), provides a brief, general outline of the basics of the business. It covers such topics as getting started, finding clients and offering services. White's *Profit from Information: A Guide to Establishment, Operation, and Use of an Information Consultancy* (London, England: Andre Deutsch, 1981), concentrates on the administrative aspects of this type of business. Although decidedly British, there are several useful chapters on general considerations of small business and office management.

Finally, there are several reference books which would be of use to an information broker. The *Encyclopedia of Information Systems and Services*, 5th edition (Detroit: Gale, 1983), is a comprehensive directory of the information industry, worldwide. This work lists thousands of information systems, services and products and is extensively indexed. It is the most complete work of its type and the most expensive (\$275). Earlier editions have been updated by *New Information Systems and Services*, which is available by subscription from Gale. Another work, *Information Industry Market Place, 1984* (New York: Bowker, 1983), provides brief descriptions of information products and services. This work includes both printed and machine-readable information sources and contains many names and addresses of information brokers, consultants, associations, and agencies. Although this directory is less comprehensive than the one discussed above, it is less expensive as well (\$42.50). *The Directory of Fee-Based Information Services* (Woodstock, N.Y.: Information Alternative, 1982), is a listing of several hundred information brokers, retailers, specialists, and consultants in the United States and abroad. It is updated by the *Journal of Fee-Based Information Services*.

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Winter 1985, *Collection Evaluation*. Editors: Elizabeth Futas, Associate Professor, Division of Library and Information Management, Emory University, Atlanta; and Sheila Intner, Assistant Professor, School of Library Service, Columbia University, New York.